

[REDACTED]

From: [REDACTED] [REDACTED]@mtm-inc.net]
Sent: Friday, February 01, 2013 2:13 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: CQ12169/KAM
Attachments: Revised MTM BAFO v2 0.pdf

Please find attached updated pricing sheets. If you have questions or need additional information, please don't hesitate to contact me. Thank you for your consideration.

[REDACTED] [REDACTED]
Vice President, Marketing, MTM, Inc.
ph. [REDACTED] | cell. [REDACTED]
16 Hawk Ridge Drive, Lake Saint Louis, MO 63367
www.mtm-inc.net

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January 22, 2013

██████████
Washington Metropolitan Area Transit Authority
600 Fifth Street
Washington, DC 20001

Dear Ms. ██████████:

MTM, Inc. is pleased to present our Best and Final Offer (BAFO) for the Quality Assurance (QA) portion of RFP No. CQ12169/KAM. MTM is the best choice for Washington Metropolitan Area Transit Authority (WMATA)'s QA contractor. As a national company with experience delivering QA activities throughout the country, including in the District of Columbia itself, MTM understands, upholds, and will deliver WMATA's commitment to providing community access to its customers via quality MetroAccess services.

Our BAFO consists of revised pricing pages and a schedule that summarizes proposed start-up costs. Based on our discussions with you on Thursday, January 17 and an in-depth review of our pricing model, we identified areas of cost reduction and also line item expenses that were not sufficient as originally proposed. Within the BAFO, we made the following modifications to our pricing model:

- Costs for help wanted advertisements were reduced
- MTM's profit margin was reduced from 7.0% to 5.5%
- Building repair costs were reduced
- Vehicle insurance costs were increased
- Vehicle sales tax was included within our start-up costs
- Transit Miner costs were increased
- Rounding differences were fixed

For your reference, I am the individual designated and officially authorized to negotiate and contractually bind MTM to this contract. Please contact me at any time during the review process with questions or comments regarding our BAFO.

Sincerely,

████████████████████
██████████

President and CEO
██████████@mtm-inc.net

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
PRICE PROPOSAL - BAFO
QUALITY ASSURANCE - FIXED RATE COST COMPONENT DETAIL
Summary of Start-up Cost

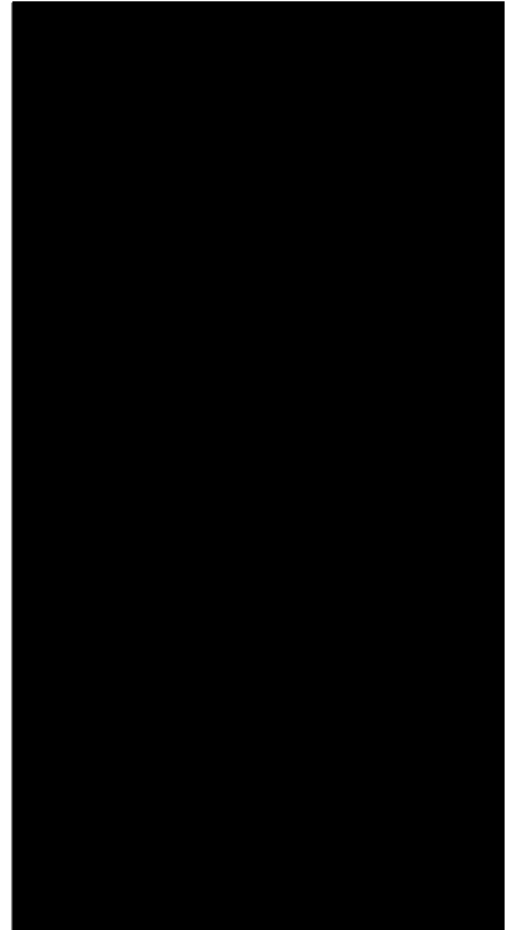
Admin - Start-up costs itemized - Year 1 only !!

Physicals (each)	Per FTE
Drug & Alcohol Testing	Per FTE
Help Wanted Advertising	Per Position
Sales Tax on Vehicles	Per Vehicle
Salaries	One Month
Fringe Benefits 2	% of Salary
Consulting for Transit Miner Software	120 Hours
Travel - Meals, Lodging, Airfare	

Operations - Start-up costs itemized - Year 1 only !!

Physicals (each)	Per FTE
Drug & Alcohol Testing	Per FTE
Help Wanted Advertising	Per Position
Salaries	One Month
Fringe Benefits 2	% of Salary
Travel - Meals, Lodging, Airfare	

Grand Total Start-Up Cost



WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

PRICE PROPOSAL

RFP CQ12169/KAM

PRICE PROPOSAL

General Instruction

Submit one original and three copies of your price proposal separately, but concurrently, with your technical proposal in an envelope or other suitable container marked Volume 1 – Cost/Price Proposal for RFP No. CQ12169/KAM. Do not include any pricing information in your technical proposal. In order for your proposal to be considered you must include pricing for all of the contract years including options for each of the three service categories on which you are proposing.

Fuel

The Service Delivery contractor(s) will **not** be responsible for fuel for revenue service vehicles. Fuel will be provided by WMATA by either fueling at the contractor's facility using fuel furnished by WMATA or by fuel cards furnished by WMATA.

Fixed Rates

Proposers must provide fixed rates for providing services under this contract using the following price proposal pages. Proposers may propose on any or all of the three service types identified in this RFP. However, proposers opting to propose on more than one service type must complete the price proposal pages applicable to each service type on which they are proposing. Blended rates or alternate pricing scenarios utilizing proposer developed pricing sheets will not be accepted.

Service Delivery Proposers must provide rates using WMATA owned vehicles with the Contractor providing Automotive Liability insurance as detailed in Part II, Section 2 – Special Provisions, No. 16 General Insurance Requirements. Fixed hourly rates shall include all applicable charges. No additional charges will be allowed. Only actual costs will be remunerated. WMATA anticipates that the average number of weekly revenue service hours will fluctuate over the term of the contract. Therefore, WMATA is soliciting pricing at various revenue service hour levels. Historically these services have been approximately 35,200 hours weekly. WMATA will work with the Contractor(s) at the Contractor's current capacity levels and shall modify service levels as demand fluctuates.

Operations Control Center Proposers must provide fixed rates per call handled. Similar to the number of weekly revenue service hours, WMATA anticipates that call volume will fluctuate over the life of the contract. Therefore, WMATA is soliciting pricing at various call volumes. Historically these volumes have been approximately 27,000 weekly.

The Quality Assurance function has both operational and administrative aspects. Therefore, the pricing for this function will be based on a combination of the service levels of the Service Delivery and Operations Control Center functions. Quality Assurance Proposers must provide pricing based on the staffing necessary to perform the oversight activities detailed in the technical specification as expressed in a fixed rate per revenue service hour and a fixed rate per

scheduled trip, including taxi. Historically revenue service hours have been approximately 35,200 hours weekly and scheduled trips have been approximately 43,000 weekly. The sum of these two rates will provide the basis for price evaluation.

Pricing will apply to both weekday and weekend service provided. The week for purposes of this contract shall be Sunday through Saturday.

Remuneration

The Contractor shall invoice for services on a monthly basis at the rate quoted for the average weekly service level within the month of service that is invoiced.

Example: If services average ___ hours per week, the Contractor rate for the service level quoted under ___ to ___ hours per week range is applied to the total hours of revenue service for that month (Total Month Revenue Service Hours *multiplied by* Rate = Gross Cost). Gross Cost is reduced by liquidated damages, imputed fares, and any other deductions, if applicable, to reach a net invoice amount to be billed to WMATA in accordance with the terms and conditions of this Contract.

Fixed Rate Detail Sheet

Provide a detailed cost breakdown of the fixed rates provided on the attached price proposal pages for the rate submitted for revenue service hours, calls handled or trips scheduled. At a minimum, proposers must provide the level of detail described on the **FIXED RATE COST COMPONENT DETAIL** sheets of this price proposal. However, proposers may include additional detail or add additional categories if necessary. If any category does not apply to the fixed hourly rates indicate this by placing an "N/A" in the appropriate place on the sheet(s).

Each service type includes two cost component breakdown sheets. ***The first sheet must detail the amount each line item contributes to the applicable fixed rate by service function. The second sheet must detail the total annual cost for each line item. The annual costs must be based on the same price proposal table lines as follows:***

- ***Service Delivery proposers must provide the breakdown of the fixed rate per revenue service hour based on the fixed rate provided on Line 3 of the Service Delivery price proposal tables;***
- ***Operations Control Center proposers must provide the detail information based on Line 2 of the Operations Control Center price proposal tables; and***
- ***Quality Assurance proposers must use the sum of the fixed rates provided for Line 3 and Line 12 of the Quality Assurance price proposal tables.***

Proposers must supply a complete breakdown of the fixed rates and provide a total annual cost for all line items for all contract years inclusive of the option years.

In order for proposals to be considered, proposers must:

Submit rates for all service levels, all years and for all service types on which they are proposing.

1. Submit Fixed Rate Cost Component Detail sheets for all service types on which they are proposing and include pricing for each year of the contract.
2. Be submitted using the forms contained in this price proposal document.
Blended Rates for multiple service types and alternate pricing scenarios will not be considered.

.....
WMATA reserves the right to reject any proposal if, at WMATA's sole discretion, the proposal appears to be unbalanced, front loaded, or otherwise artificially priced.

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

PRICE PROPOSAL

RFP CQ12169/KAM

The **Quality Assurance Contractor** shall provide fixed hourly rates for each service level benchmark for each year of the contract. Estimated hours are provided for evaluation purposes only and do not represent a firm commitment to purchase any amount of service. Actual service levels may vary widely from the estimated service levels shown. The fixed hourly rates are to include all applicable charges. No additional charges will be allowed.

Year One – July 1, 2013 – June 30, 2014

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Year Two – July 1, 2014 – June 30, 2015

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
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13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Year Three – July 1, 2015 – June 30, 2016

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Year Four – July 1, 2016 – June 30, 2017

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Year Five – July 1, 2017 – June 30, 2018

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Option Year One – July 1, 2018 – June 30, 2019

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Option Year Two – July 1, 2019 – June 30, 2020

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Option Year Three – July 1, 2020 – June 30, 2021

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
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16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Option Year Four – July 1, 2021 – June 30, 2022

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
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9	Estimated Annual Revenue Service Hours	
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13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Option Year Five – July 1, 2022 – June 30, 2023

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)	
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17	Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

PRICE PROPOSAL

RFP CQ12169/KAM

QUALITY ASSURANCE - FIXED RATE COST COMPONENT DETAIL

FOR EACH LINE ITEM ENTER THE AMOUNT IT CONTRIBUTES TO THE OVERALL RATE BY YEAR

No.	Cost Line Items	Year 1	Year 2	Year 3	Year 4	Year 5	Option Year 1	Option Year 2	Option Year3	Option Year 4	Option Year 5
LABOR											
1	General Manager										
2	Administrative QA Manager										
3	Operations QA Manager										
4	Customer Service Agent										
5	Quality (NICE) Monitors										
6	Consumer Advocate										
7	Driver Certification Auditors										
8	Fleet Specialists										
9	Billing Auditor										
10	Road Supervisors										
11	Real Time MACS-OCC Monitor										
	Facility and Maintenance Monitor										
	Safety and Street Supervisors										
	QA Representative										
	QA Coordinator										
	Compliance Auditor										
	No Show Specialist										
	QA Support Coach										
	Data Analyst										
	Data Base Support/IT										
MATERIAL & OTHER COSTS											
12	Physicals										
13	Help Wanted Advertising										
14	Professional/General Liability Insurance										
15	Administrative support										
16	IT support										
17	Start-up Costs ¹										
18	Fringe Benefits ²										
19	General & Administrative Costs										
20	Profit										
21	Other (Itemize)										
	Repair & Maintenance – Building										
	Repair & Maintenance – Equipment										

	Transit Miner Software Fee	
	Transit Miner Consulting Fee	
	Depreciation – Autos	
	Gas and Repairs on Owned Vehicles	
	Insurance and Annual Registration Fee	
	State Tax – Franchise and Other	
	Rounding	

¹ Proposers may be required to provide detailed start-up costs upon WMATA's request.

² Proposers may be required to provide detailed information on employer versus employee paid fringe benefits.

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
PRICE PROPOSAL RFP CQ12169/KAM
QUALITY ASSURANCE - FIXED RATE COST COMPONENT DETAIL
FOR EACH LINE ITEM ENTER THE TOTAL OVERALL ANNUAL COST

No.	Cost Line Items	Year 1	Year 2	Year 3	Year 4	Year 5	Option Year 1	Option Year 2	Option Year3	Option Year 4	Option Year 5
LABOR											
1	General Manager										
2	Administrative QA Manager										
3	Operations QA Manager										
4	Customer Service Agent										
5	Quality (NICE) Monitors										
6	Consumer Advocate										
7	Driver Certification Auditors										
8	Fleet Specialists										
9	Billing Auditor										
10	Road Supervisors										
11	Real Time MACS-OCC Monitor										
	Facility and Maintenance Monitor										
	Safety and Street Supervisors										
	QA Representative										
	QA Coordinator										
	Compliance Auditor										
	No Show Specialist										
	QA Support Coach										
	Data Analyst										
	Data Base Support/IT										
MATERIAL & OTHER COSTS											
12	Physicals										
13	Help Wanted Advertising										
14	Professional/General Liability Insurance										
15	Administrative support										
16	IT support										
17	Start-up Costs ¹										
18	Fringe Benefits ²										
19	General & Administrative Costs										
20	Profit										
21	Other (Itemize)										
	Repair & Maintenance – Building										

	Repair & Maintenance – Equipment
	Transit Miner Software Fee
	Transit Miner Consulting Fee
	Depreciation – Autos
	Gas and Repairs on Owned Vehicles
	Insurance and Annual Registration Fee
	State Tax – Franchise and Other



¹ Proposers may be required to provide detailed start-up costs upon WMATA's request.

² Proposers may be required to provide detailed information on employer versus employee paid fringe benefits.

[REDACTED]

From: [REDACTED] [mailto:[REDACTED]@mtm-inc.net]
Sent: Friday, January 13, 2012 10:47 AM
To: [REDACTED]
Subject: MTM - Buy American Form
Attachments: Buy American Act Certification.pdf

Please find the signed Buy American Act form attached. Insurance form to follow.

[REDACTED]
Director of Marketing
Medical Transportation Management, Inc.
[REDACTED] (Office)
[REDACTED] (Cell)
[REDACTED]@mtm-inc.net

Helping People Access Healthcare through Quality Transportation Management

Email Confidentiality Notice: The information contained in this transmission is confidential, proprietary or privileged and may be subject to protection under the law, including the Health Insurance Portability and Accountability Act (HIPAA). The message is intended for the sole use of the individual or entity to whom it is addressed. If you are not the intended recipient, you are notified that any use, distribution or copying of the message is strictly prohibited and may subject you to criminal or civil penalties. If you received this transmission in error, please contact the sender immediately by replying to this email and delete the material from any computer.

From: [REDACTED] [mailto:[REDACTED]@wmata.com]
Sent: Friday, January 13, 2012 9:13 AM
To: [REDACTED]
Subject: RE: MTM

Good Morning,

Please contact [REDACTED] for registration assistance, at [REDACTED]@wmata.com or (202) 962-[REDACTED]. If you are having trouble getting hold of him, please let me know.

From: [REDACTED] [mailto:[REDACTED]@mtm-inc.net]
Sent: Friday, January 13, 2012 9:08 AM
To: [REDACTED]
Subject: MTM

Hello [REDACTED],
I am responding on behalf of [REDACTED] on the question you had about our registration as a vendor on www.wmata.com. We did register some time ago setting us the following:

User: [REDACTED]
Password: [REDACTED]

When I tried to access the system yesterday using this information, it told me my password had expired, but I was unable to update. We sent an email requesting assistance. We even tried to go in and re-register, but it said there was a duplicate file for MTM.

Please let me know if there is someone I should contact or anything else we need to do to verify registration on the WMATA Vendor Registration System. The other documentation you have requested will be forwarded shortly. Thank you for your consideration.

[REDACTED]
Director of Marketing
Medical Transportation Management, Inc.
[REDACTED] (Office)
[REDACTED] (Cell)
[REDACTED]@mtm-inc.net

Helping People Access Healthcare through Quality Transportation Management

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[REDACTED]

From: [REDACTED] [REDACTED]@mtm-inc.net]
Sent: Tuesday, January 22, 2013 4:48 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: MTM BAFO - RFP CQ121269/KAM
Attachments: Revised MTM BAFO v1.3.pdf

Please find attached our Best and Final Offer for RFP No. CQ12169/KAM. Thank you for your consideration.

[REDACTED] [REDACTED]
Vice President, Marketing, MTM, Inc.
ph. [REDACTED] | cell. [REDACTED]
16 Hawk Ridge Drive, Lake Saint Louis, MO 63367
www.mtm-inc.net

This communication contains information that is confidential and is solely for the use of the intended recipient. It may contain information that is privileged and exempt from disclosure under applicable law. If you are not the intended recipient of this communication, please be advised that any disclosure, copying, distribution or unauthorized use of this communication is strictly prohibited. Please also notify MTM at 1-888-561-8747 and return the communication to the originating address.



January 22, 2013

██████████
Washington Metropolitan Area Transit Authority
600 Fifth Street
Washington, DC 20001

Dear ██████████

MTM, Inc. is pleased to present our Best and Final Offer (BAFO) for the Quality Assurance (QA) portion of RFP No. CQ12169/KAM. MTM is the best choice for Washington Metropolitan Area Transit Authority (WMATA)'s QA contractor. As a national company with experience delivering QA activities throughout the country, including in the District of Columbia itself, MTM understands, upholds, and will deliver WMATA's commitment to providing community access to its customers via quality MetroAccess services.

Our BAFO consists of revised pricing pages and a schedule that summarizes proposed start-up costs. Based on our discussions with you on Thursday, January 17 and an in-depth review of our pricing model, we identified areas of cost reduction and also line item expenses that were not sufficient as originally proposed. Within the BAFO, we made the following modifications to our pricing model:

- Costs for help wanted advertisements were reduced
- MTM's profit margin was reduced from 7.0% to 5.5%
- Building repair costs were reduced
- Vehicle insurance costs were increased
- Vehicle sales tax was included within our start-up costs
- Transit Miner costs were increased
- Rounding differences were fixed

For your reference, I am the individual designated and officially authorized to negotiate and contractually bind MTM to this contract. Please contact me at any time during the review process with questions or comments regarding our BAFO.

Sincerely,

████████████████████

██████████

President and CEO

██████████@mtm-inc.net

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
PRICE PROPOSAL - BAFO
QUALITY ASSURANCE - FIXED RATE COST COMPONENT DETAIL
Summary of Start-up Cost

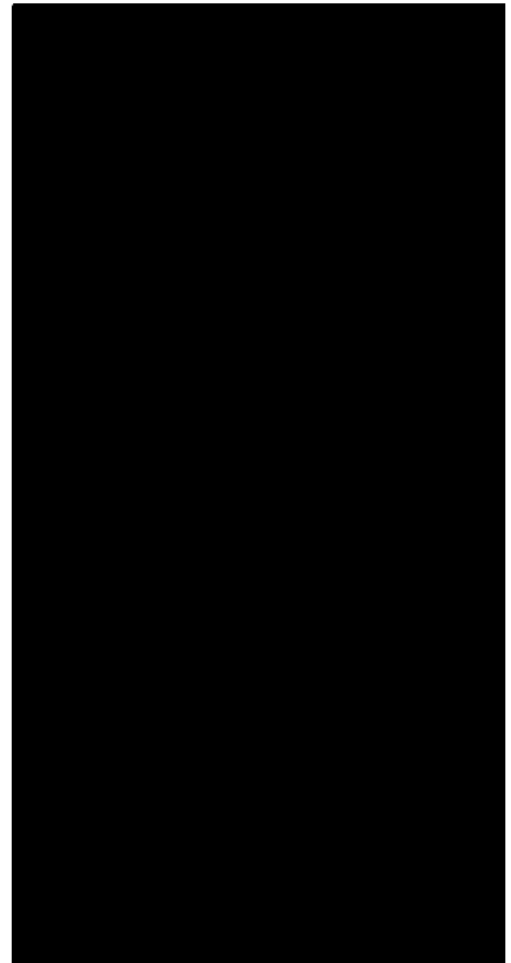
Admin - Start-up costs itemized - Year 1 only !!

Physicals (each)	Per FTE
Drug & Alcohol Testing	Per FTE
Help Wanted Advertising	Per Position
Sales Tax on Vehicles	Per Vehicle
Salaries	One Month
Fringe Benefits 2	% of Salary
Consulting for Transit Miner Software	120 Hours
Travel - Meals, Lodging, Airfare	

Operations - Start-up costs itemized - Year 1 only !!

Physicals (each)	Per FTE
Drug & Alcohol Testing	Per FTE
Help Wanted Advertising	Per Position
Salaries	One Month
Fringe Benefits 2	% of Salary
Travel - Meals, Lodging, Airfare	

Grand Total Start-Up Cost



WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

PRICE PROPOSAL

RFP CQ12169/KAM

PRICE PROPOSAL

General Instruction

Submit one original and three copies of your price proposal separately, but concurrently, with your technical proposal in an envelope or other suitable container marked Volume 1 – Cost/Price Proposal for RFP No. CQ12169/KAM. Do not include any pricing information in your technical proposal. In order for your proposal to be considered you must include pricing for all of the contract years including options for each of the three service categories on which you are proposing.

Fuel

The Service Delivery contractor(s) will **not** be responsible for fuel for revenue service vehicles. Fuel will be provided by WMATA by either fueling at the contractor's facility using fuel furnished by WMATA or by fuel cards furnished by WMATA.

Fixed Rates

Proposers must provide fixed rates for providing services under this contract using the following price proposal pages. Proposers may propose on any or all of the three service types identified in this RFP. However, proposers opting to propose on more than one service type must complete the price proposal pages applicable to each service type on which they are proposing. Blended rates or alternate pricing scenarios utilizing proposer developed pricing sheets will not be accepted.

Service Delivery Proposers must provide rates using WMATA owned vehicles with the Contractor providing Automotive Liability insurance as detailed in Part II, Section 2 – Special Provisions, No. 16 General Insurance Requirements. Fixed hourly rates shall include all applicable charges. No additional charges will be allowed. Only actual costs will be remunerated. WMATA anticipates that the average number of weekly revenue service hours will fluctuate over the term of the contract. Therefore, WMATA is soliciting pricing at various revenue service hour levels. Historically these services have been approximately 35,200 hours weekly. WMATA will work with the Contractor(s) at the Contractor's current capacity levels and shall modify service levels as demand fluctuates.

Operations Control Center Proposers must provide fixed rates per call handled. Similar to the number of weekly revenue service hours, WMATA anticipates that call volume will fluctuate over the life of the contract. Therefore, WMATA is soliciting pricing at various call volumes. Historically these volumes have been approximately 27,000 weekly.

The Quality Assurance function has both operational and administrative aspects. Therefore, the pricing for this function will be based on a combination of the service levels of the Service Delivery and Operations Control Center functions. Quality Assurance Proposers must provide pricing based on the staffing necessary to perform the oversight activities detailed in the technical specification as expressed in a fixed rate per revenue service hour and a fixed rate per

scheduled trip, including taxi. Historically revenue service hours have been approximately 35,200 hours weekly and scheduled trips have been approximately 43,000 weekly. The sum of these two rates will provide the basis for price evaluation.

Pricing will apply to both weekday and weekend service provided. The week for purposes of this contract shall be Sunday through Saturday.

Remuneration

The Contractor shall invoice for services on a monthly basis at the rate quoted for the average weekly service level within the month of service that is invoiced.

Example: If services average ___ hours per week, the Contractor rate for the service level quoted under ___ to ___ hours per week range is applied to the total hours of revenue service for that month (Total Month Revenue Service Hours *multiplied by* Rate = Gross Cost). Gross Cost is reduced by liquidated damages, imputed fares, and any other deductions, if applicable, to reach a net invoice amount to be billed to WMATA in accordance with the terms and conditions of this Contract.

Fixed Rate Detail Sheet

Provide a detailed cost breakdown of the fixed rates provided on the attached price proposal pages for the rate submitted for revenue service hours, calls handled or trips scheduled. At a minimum, proposers must provide the level of detail described on the **FIXED RATE COST COMPONENT DETAIL** sheets of this price proposal. However, proposers may include additional detail or add additional categories if necessary. If any category does not apply to the fixed hourly rates indicate this by placing an "N/A" in the appropriate place on the sheet(s).

Each service type includes two cost component breakdown sheets. ***The first sheet must detail the amount each line item contributes to the applicable fixed rate by service function. The second sheet must detail the total annual cost for each line item. The annual costs must be based on the same price proposal table lines as follows:***

- ***Service Delivery proposers must provide the breakdown of the fixed rate per revenue service hour based on the fixed rate provided on Line 3 of the Service Delivery price proposal tables;***
- ***Operations Control Center proposers must provide the detail information based on Line 2 of the Operations Control Center price proposal tables; and***
- ***Quality Assurance proposers must use the sum of the fixed rates provided for Line 3 and Line 12 of the Quality Assurance price proposal tables.***

Proposers must supply a complete breakdown of the fixed rates and provide a total annual cost for all line items for all contract years inclusive of the option years.

In order for proposals to be considered, proposers must:

Submit rates for all service levels, all years and for all service types on which they are proposing.

- 1. Submit Fixed Rate Cost Component Detail sheets for all service types on which they are proposing and include pricing for each year of the contract.**
- 2. Be submitted using the forms contained in this price proposal document.
Blended Rates for multiple service types and alternate pricing scenarios will not be considered.**

.....
WMATA reserves the right to reject any proposal if, at WMATA's sole discretion, the proposal appears to be unbalanced, front loaded, or otherwise artificially priced.

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

PRICE PROPOSAL

RFP CQ12169/KAM

The **Quality Assurance Contractor** shall provide fixed hourly rates for each service level benchmark for each year of the contract. Estimated hours are provided for evaluation purposes only and do not represent a firm commitment to purchase any amount of service. Actual service levels may vary widely from the estimated service levels shown. The fixed hourly rates are to include all applicable charges. No additional charges will be allowed.

Year One – July 1, 2013 – June 30, 2014

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Year Two – July 1, 2014 – June 30, 2015

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Year Three – July 1, 2015 – June 30, 2016

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Year Four – July 1, 2016 – June 30, 2017

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Year Five – July 1, 2017 – June 30, 2018

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Option Year One – July 1, 2018 – June 30, 2019

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Option Year Two – July 1, 2019 – June 30, 2020

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Option Year Three – July 1, 2020 – June 30, 2021

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
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14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Option Year Four – July 1, 2021 – June 30, 2022

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
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13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

Option Year Five – July 1, 2022 – June 30, 2023

No.	Service Levels	Fixed Hourly Rate
1	3,520 to 8,799 RSH (10% to 25% of current RSH)	
2	8,800 to 14,079 RSH (25% to 40% of current RSH)	
3	14,080 to 21,119 RSH (40% to 60% of current RSH)	
4	21,120 to 28,159 RSH (60% to 80% of current RSH)	
5	28,160 to 42,240 RSH (80% to 120% of current RSH)	
6	42,241 to 49,280 RSH (120% to 140% of current RSH)	
7	Sum of Hourly Rates (add Lines 1 through 6)	
8	Average Hourly Rate (divide Line 7 by the number 6)	
9	Estimated Annual Revenue Service Hours	
10	<i>Estimated Annual Operations QA Cost Year 1 (multiply Line 8 by Line 9)</i>	
11	29,240 to 36,550 scheduled trips, including taxi, per week	
12	36,551 to 49,450 scheduled trips, including taxi, per week	
13	49,451 to 59,341 scheduled trips, including taxi, per week	
14	Sum of Scheduled Trips (add Lines 11 through 13)	
15	Average Scheduled Trips (divide Line 14 by the number 3)	
16	Estimated Annual Scheduled Trips, Including Taxi	
17	<i>Estimated Annual Administrative QA Cost Year 1 (multiply Line 15 by Line 16)</i>	
18	Estimated Annual Cost Year 1 (add Line 10 and Line 17)	

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

PRICE PROPOSAL

RFP CQ12169/KAM

QUALITY ASSURANCE - FIXED RATE COST COMPONENT DETAIL

FOR EACH LINE ITEM ENTER THE AMOUNT IT CONTRIBUTES TO THE OVERALL RATE BY YEAR

No.	Cost Line Items	Year 1	Year 2	Year 3	Year 4	Year 5	Option Year 1'	Option Year 2	Option Year3	Option Year 4	Option Year 5
LABOR											
1	General Manager										
2	Administrative QA Manager										
3	Operations QA Manager										
4	Customer Service Agent										
5	Quality (NICE) Monitors										
6	Consumer Advocate										
7	Driver Certification Auditors										
8	Fleet Specialists										
9	Billing Auditor										
10	Road Supervisors										
11	Real Time MACS-OCC Monitor										
	Facility and Maintenance Monitor										
	Safety and Street Supervisors										
	QA Representative										
	QA Coordinator										
	Compliance Auditor										
	No Show Specialist										
	QA Support Coach										
	Data Analysis										
	Data Base Support/IT										
MATERIAL & OTHER COSTS											
12	Physicals										
13	Help Wanted Advertising										
14	Professional/General Liability Insurance										
15	Administrative support										
16	IT support										
17	Start-up Costs ¹										
18	Fringe Benefits ²										
19	General & Administrative Costs										
20	Profit										
21	Other (Itemize)										
	Repair & Maintenance – Building										
	Repair & Maintenance – Equipment										

	Transit Miner Software Fee	
	Transit Miner Consulting Fee	
	Depreciation – Autos	
	Gas and Repairs on Owned Vehicles	
	Insurance and Annual Registration Fee	
	State Tax – Franchise and Other	
	Rounding	

¹ Proposers may be required to provide detailed start-up costs upon WMATA's request.

² Proposers may be required to provide detailed information on employer versus employee paid fringe benefits.

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
 PRICE PROPOSAL RFP CQ12169/KAM

QUALITY ASSURANCE - FIXED RATE COST COMPONENT DETAIL
FOR EACH LINE ITEM ENTER THE TOTAL OVERALL ANNUAL COST

No.	Cost Line Items	Year 1	Year 2	Year 3	Year 4	Year 5	Option Year 1	Option Year 2	Option Year 3	Option Year 4	Option Year 5
LABOR											
1	General Manager										
2	Administrative QA Manager										
3	Operations QA Manager										
4	Customer Service Agent										
5	Quality (NICE) Monitors										
6	Consumer Advocate										
7	Driver Certification Auditors										
8	Fleet Specialists										
9	Billing Auditor										
10	Road Supervisors										
11	Real Time MACS-OCC Monitor										
	Facility and Maintenance Monitor										
	Safety and Street Supervisors										
	QA Representative										
	QA Coordinator										
	Compliance Auditor										
	No Show Specialist										
	QA Support Coach										
	Data Analysis										
	Data Base Support/IT										
MATERIAL & OTHER COSTS											
12	Physicals										
13	Help Wanted Advertising										
14	Professional/General Liability Insurance										
15	Administrative support										
16	IT support										
17	Start-up Costs ¹										
18	Fringe Benefits ²										
19	General & Administrative Costs										
20	Profit										
21	Other (Itemize)										
	Repair & Maintenance – Building										

	Repair & Maintenance – Equipment	
	Transit Miner Software Fee	
	Transit Miner Consulting Fee	
	Depreciation – Autos	
	Gas and Repairs on Owned Vehicles	
	Insurance and Annual Registration Fee	
	State Tax – Franchise and Other	

¹ Proposers may be required to provide detailed start-up costs upon WMATA's request.

² Proposers may be required to provide detailed information on employer versus employee paid fringe benefits.

QUALITY ASSURANCE - FIXED RATE COST COMPONENT DETAIL
FOR EACH LINE ITEM ENTER THE TOTAL OVERALL ANNUAL COST

Cost Line Items	Year 1	Year 2	Year 3	Year 4	Year 5	Option Year 1 ¹	Option Year 2	Option Year 3	Option Year 4	Option Year 5
LABOR										
General Manager	\$									
Administrative QA Manager	\$									
Operations QA Manager	\$									
Billing Auditor	\$									
Facility and Maintenance Monitor	\$									
Safety and Street Supervisors	\$									
QA Representative	\$									
QA Coordinator	\$									
Compliance Auditor	\$									
No Show Specialist	\$									
QA Support Coach	\$									
Data Analysis	\$									
Data Base Support/IT Tech	\$									
MATERIAL & OTHER COSTS										
Physicals	\$									
Help Wanted Advertising	\$									
Professional/General Liability Insurance	\$									
Administrative support	\$									
IT support	\$									
Start-up Costs ¹	\$									
Fringe Benefits ²	\$									
General & Administrative Costs	\$									
Profit	\$									
Repair & Maintenance - Building	\$									
Repair & Maintenance - Equipment	\$									
Depreciation - Autos	\$									
Gas and Vehicle Repairs	\$									
Insurance on Vehicles	\$									
State Tax - Franchise and Other	\$									
	\$									

ice Proposal included Fixed Hourly Rates containing significant digits that were not shown. The price information shown is based on calculations Fixed Hourly Rates with the significant digits as provided.

[REDACTED]

From: [REDACTED]
Sent: Friday, January 18, 2013 4:41 PM
To: [REDACTED]
Subject: CQ12169/KAM,
Attachments: DOC.pdf

Items discussed at Meeting January 17th. As a reminder, your response is due by COB January 22nd. Please include additional items as discussed. Also, please provide the names of all the attendees on your end, as I would like to make sure the names are correct.

Thank you.

[REDACTED]

From: [REDACTED] [REDACTED]@mtm-inc.net]
Sent: Tuesday, January 15, 2013 4:18 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: RE: RFQ CQ12169/KAM

Scott has cleared his calendar, he will now be in St. Louis and available for the Video conference on Thursday, 9am Eastern/8am Central.

Thank you.

[REDACTED]
Executive Assistant, MTM, Inc.
Ph: [REDACTED] | Fax: 636-561-2962
16 Hawk Ridge Drive | Lake St. Louis, MO 63367
Email: [REDACTED]@mtm-inc.net
www.mtm-inc.net

-----Original Message-----

From: [REDACTED] [mailto:[REDACTED]@wmata.com]
Sent: Tuesday, January 15, 2013 2:05 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: RE: RFQ CQ12169/KAM

Ms. [REDACTED]:

I do apologize, but my Chief Procurement Officer (CPO) just found out that she has another meeting which she cannot cancel. Therefore, we need to move the meeting to Thursday, January 17th at 9:00 A.M. EST.

-----Original Message-----

From: [REDACTED] [mailto:[REDACTED]@mtm-inc.net]
Sent: Tuesday, January 15, 2013 2:34 PM
To: [REDACTED]
Cc: Nanette Meagher
Subject: Re: RFQ CQ12169/KAM

[REDACTED] - Scott will be in our offices for the interview. Thank you!

[REDACTED]

Sent from my iPhone

On Jan 15, 2013, at 12:23 PM, [REDACTED] [mailto:[REDACTED]@wmata.com] wrote:

> Please advise if Scott is in your area and can be in your Office for the video conference.

>

> -----Original Message-----

> **From:** [REDACTED] [mailto:[REDACTED]@mtm-inc.net]
> **Sent:** Tuesday, January 15, 2013 11:37 AM

> To: [REDACTED]
> Cc: [REDACTED]; [REDACTED]; [REDACTED]@pbworld.com; [REDACTED]
> Subject: Re: RFQ CQ12169/KAM

> Hi [REDACTED] - we can confirm the time and date for negotiations. [REDACTED] could be available there in person. Or would you rather he be in our offices on the video conferencing? Please advise.

> Thank you,

> [REDACTED]

> Sent from my iPhone

> On Jan 15, 2013, at 10:31 AM, "[REDACTED]@wmata.com" <mailto:[REDACTED]@wmata.com> wrote:

> Good Morning Ms. [REDACTED]:

> WMATA would like to conduct negotiations with you regarding your Best and Final Offer (BAFO) on Wednesday, January 16th at 3:00 P.M. via video conference. The discussion will include all cost elements for the QA Advisor Service. Since you switched the role of General Manager to Mr. [REDACTED], WMATA would like to have him present at this meeting. Please advise by 3:30 P.M. today, if you will be available on the date and time requested.
> This communication contains information that is confidential and is solely for the use of the intended recipient. It may contain information that is privileged and exempt from disclosure under applicable law. If you are not the intended recipient of this communication, please be advised that any disclosure, copying, distribution or unauthorized use of this communication is strictly prohibited. Please also notify MTM at 1-888-561-8747 and return the communication to the originating address.

[REDACTED]

From: [REDACTED] [REDACTED]@mtm-inc.net]
Sent: Tuesday, January 15, 2013 3:07 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: Re: RFQ CQ12169/KAM

Ok. Let us connect with Scott and confirm with you. Thank you.

Sent from my iPhone

On Jan 15, 2013, at 3:04 PM, "[REDACTED] [REDACTED]@wmata.com" wrote:

> Ms. [REDACTED]:

>

> I do apologize, but my Chief Procurement Officer (CPO) just found out that she has another meeting which she cannot cancel. Therefore, we need to move the meeting to Thursday, January 17th at 9:00 A.M. EST.

>

> -----Original Message-----

> From: [REDACTED] [mailto:[REDACTED]@mtm-inc.net]
> Sent: Tuesday, January 15, 2013 2:34 PM
> To: [REDACTED]
> Cc: [REDACTED]
> Subject: Re: RFQ CQ12169/KAM

>

> [REDACTED] - Scott will be in our offices for the interview. Thank you!

>

> [REDACTED]

>

> Sent from my iPhone

>

> On Jan 15, 2013, at 12:23 PM, "[REDACTED] [REDACTED]@wmata.com" wrote:

>

>> Please advise if [REDACTED] is in your area and can be in your Office for the video conference.

>>

>> -----Original Message-----

>> From: [REDACTED] [mailto:[REDACTED]@mtm-inc.net]
>> Sent: Tuesday, January 15, 2013 11:37 AM
>> To: [REDACTED]
>> Cc: [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]@pbworld.com; [REDACTED]
>> [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]
>> Subject: Re: RFQ CQ12169/KAM

>>

>> Hi [REDACTED] - we can confirm the time and date for negotiations. [REDACTED] could be available there in person. Or would you rather he be in our offices on the video conferencing? Please advise.

>>

>> Thank you,

>>

>> [REDACTED]

>>

>> Sent from my iPhone

>>

>> On Jan 15, 2013, at 10:31 AM, [REDACTED]
[REDACTED]@wmata.com<mailto:KMcSween@wmata.com>> wrote:

>>

>> Good Morning Ms. [REDACTED]:

>>

>> WMATA would like to conduct negotiations with you regarding your Best and Final Offer (BAFO) on Wednesday, January 16th at 3:00 P.M. via video conference. The discussion will include all cost elements for the QA Advisor Service. Since you switched the role of General Manager to [REDACTED], WMATA would like to have him present at this meeting. Please advise by 3:30 P.M. today, if you will be available on the date and time requested.

>> This communication contains information that is confidential and is solely for the use of the intended recipient. It may contain information that is privileged and exempt from disclosure under applicable law. If you are not the intended recipient of this communication, please be advised that any disclosure, copying, distribution or unauthorized use of this communication is strictly prohibited. Please also notify MTM at 1-888-561-8747 and return the communication to the originating address.

[REDACTED]

From: [REDACTED]
Sent: Tuesday, January 15, 2013 11:33 AM
To: [REDACTED]@mtm-inc.net'
Cc: [REDACTED]; [REDACTED]; [REDACTED]@pbworld.com'; [REDACTED]
Subject: RFQ CQ12169/KAM

Good Morning [REDACTED]:

WMATA would like to conduct negotiations with you regarding your Best and Final Offer (BAFO) on Wednesday, January 16th at 3:00 P.M. via video conference. The discussion will include all cost elements for the QA Advisor Service. Since you switched the role of General Manager to [REDACTED], WMATA would like to have him present at this meeting. Please advise by 3:30 P.M. today, if you will be available on the date and time requested.



January 22, 2013

[REDACTED]
Washington Metropolitan Area Transit Authority
600 Fifth Street
Washington, DC 20001

Dear Ms. [REDACTED]

MTM, Inc. is pleased to present our Best and Final Offer (BAFO) for the Quality Assurance (QA) portion of RFP No. CQ12169/KAM. MTM is the best choice for Washington Metropolitan Area Transit Authority (WMATA)'s QA contractor. As a national company with experience delivering QA activities throughout the country, including in the District of Columbia itself, MTM understands, upholds, and will deliver WMATA's commitment to providing community access to its customers via quality MetroAccess services.

Our BAFO consists of revised pricing pages and a schedule that summarizes proposed start-up costs. Based on our discussions with you on Thursday, January 17 and an in-depth review of our pricing model, we identified areas of cost reduction and also line item expenses that were not sufficient as originally proposed. Within the BAFO, we made the following modifications to our pricing model:

- Costs for help wanted advertisements were reduced
- MTM's profit margin was reduced from 7.0% to 5.5%
- Building repair costs were reduced
- Vehicle insurance costs were increased
- Vehicle sales tax was included within our start-up costs
- Transit Miner costs were increased
- Rounding differences were fixed

For your reference, I am the individual designated and officially authorized to negotiate and contractually bind MTM to this contract. Please contact me at any time during the review process with questions or comments regarding our BAFO.

Sincerely,

[REDACTED]

[REDACTED]

President and CEO

[REDACTED]@mtm-inc.net

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
PRICE PROPOSAL - BAFO
QUALITY ASSURANCE - FIXED RATE COST COMPONENT DETAIL
Summary of Start-up Cost

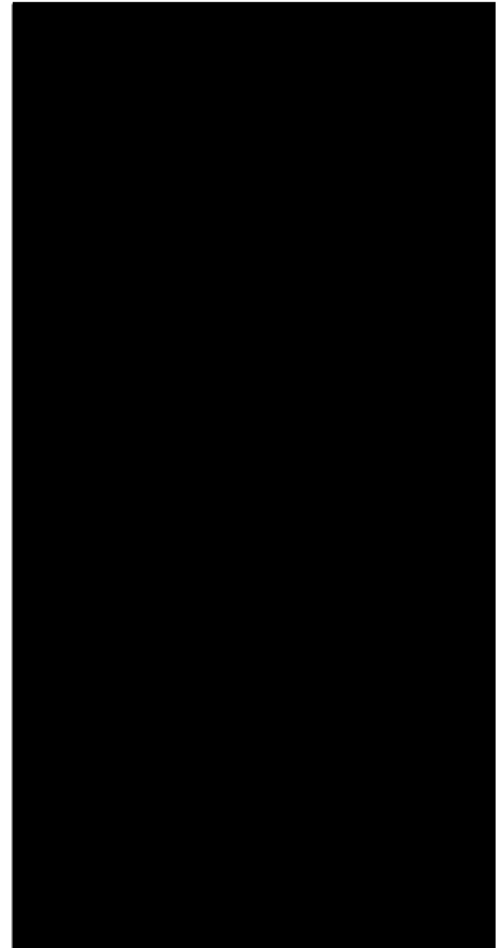
Admin - Start-up costs itemized - Year 1 only !!

Physicals (each)	Per FTE
Drug & Alcohol Testing	Per FTE
Help Wanted Advertising	Per Position
Sales Tax on Vehicles	Per Vehicle
Salaries	One Month
Fringe Benefits 2	% of Salary
Consulting for Transit Miner Software	120 Hours
Travel - Meals, Lodging, Airfare	

Operations - Start-up costs itemized - Year 1 only !!

Physicals (each)	Per FTE
Drug & Alcohol Testing	Per FTE
Help Wanted Advertising	Per Position
Salaries	One Month
Fringe Benefits 2	% of Salary
Travel - Meals, Lodging, Airfare	

Grand Total Start-Up Cost



[REDACTED]

From: [REDACTED]
Sent: Friday, December 21, 2012 4:57 PM
To: [REDACTED]@mtm-inc.net
Cc: [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED];
Subject: CQ12169/KAM, BAFO
Attachments: DOC.pdf

Good Afternoon [REDACTED]:

Please see the attached letter requesting your Best and Final Offer (BAFO). Your response should be sent to the attention of [REDACTED] at [REDACTED]@wmata.com.



December 21, 2012

[REDACTED]
CEO
Medical Transportation Management
16 Hawk Ridge Drive,
Lake Saint Louis, MO 63367

Reference: RFP CQ12169/KAM
Best and Final Offer (BAFO)

Dear [REDACTED]:

The Washington Metropolitan Area Transit Authority (WMATA) appreciated the time and effort you took to have discussions on the areas provided for Quality Assurance (QA). As we move forward in the process, this is a request for BAFO. The following is required from you:

- Please re-examine your cost proposal, especially the ancillary costs.
- Please provide a detailed explanation of how your proposed General Manager will build collaborative relationships with and between the OCC and Service Delivery contractors.
- Please identify the position that will be responsible for development of ad-hoc queries and reports and the skill set you will seek for that position.

A response is requested by 12 Noon, January 3, 2013 EST.

Should you have any questions, please contact [REDACTED] at (202) 962-[REDACTED]@wmata.com.

Sincerely,

[REDACTED]

Contracting Officer
Office of Procurement and Materials

**Washington
Metropolitan Area
Transit Authority**

600 Fifth Street, NW
Washington, D.C. 20001
202/962-1234

*By Metrorail:
Judiciary Square-Red Line
Gallery Place-Chinatown
Red, Green and
Yellow Lines*

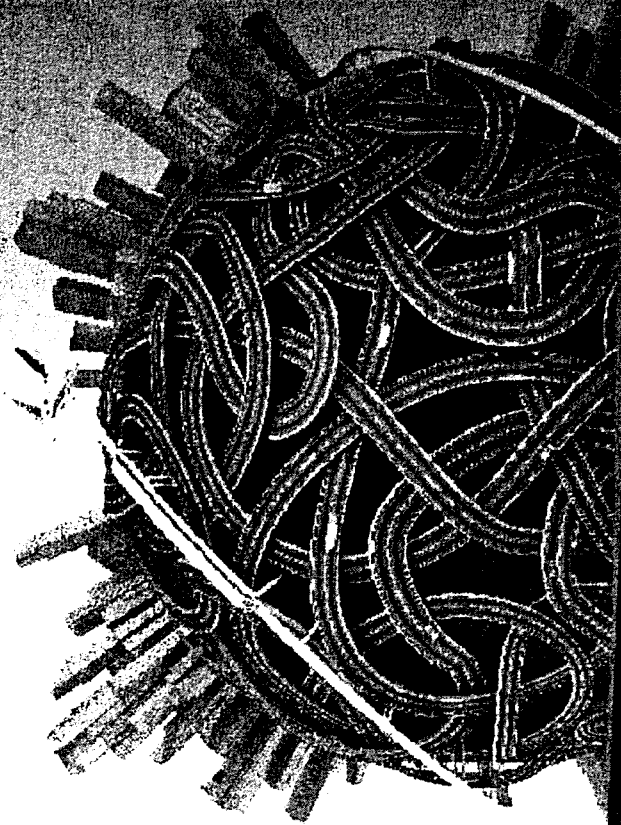
*A District of Columbia
Maryland and Virginia
Transit Partnership*



Transportation
Management

WMATA Request for Discussion – Quality Assurance

December 20, 2012



Introductions

- [REDACTED], President and CEO
- [REDACTED], Regional Director
- [REDACTED] Proposed General Manager

Approach

- Leverage paratransit experience and extensive knowledge of service area
- Incorporate best practices from current NEMT operations
- Hold ourselves, OCC, and Service Delivery subcontractors accountable to WMATA service standards
- Use data to find and address root causes of substandard performance
- Build culture that fosters communication and innovation

Key Activities

- Monitor OCC activities, including reservations, dispatch , and scheduling
- Perform on-street monitoring and Mystery Rider activities
- Inspect Service Delivery contractors' facilities
- Review late cancellations and no shows
- Investigate and resolve complaints
- Evaluate and report program data
- Facilitate corrective actions plans for the OCC and Service Delivery contractors

– General Manager

- Fourteen years experience in the transportation industry including management, supervisory, and technical roles
- Assistant Call Center Manager for MetroAccess program from 2005-2007
- Currently the Operations Manager for New Jersey Transit's Access Link – Region 5 (paratransit service)
- Dedicated to providing customers with the highest quality service experience possible

Challenges

- Developing new procedures, processes, and technology linkages in a timely manner
- Recruiting and hiring staff that meet a high performance, quality profile
- Coordinating with the OCC and Service Delivery contractors
- Being an effective change agent

Implementation

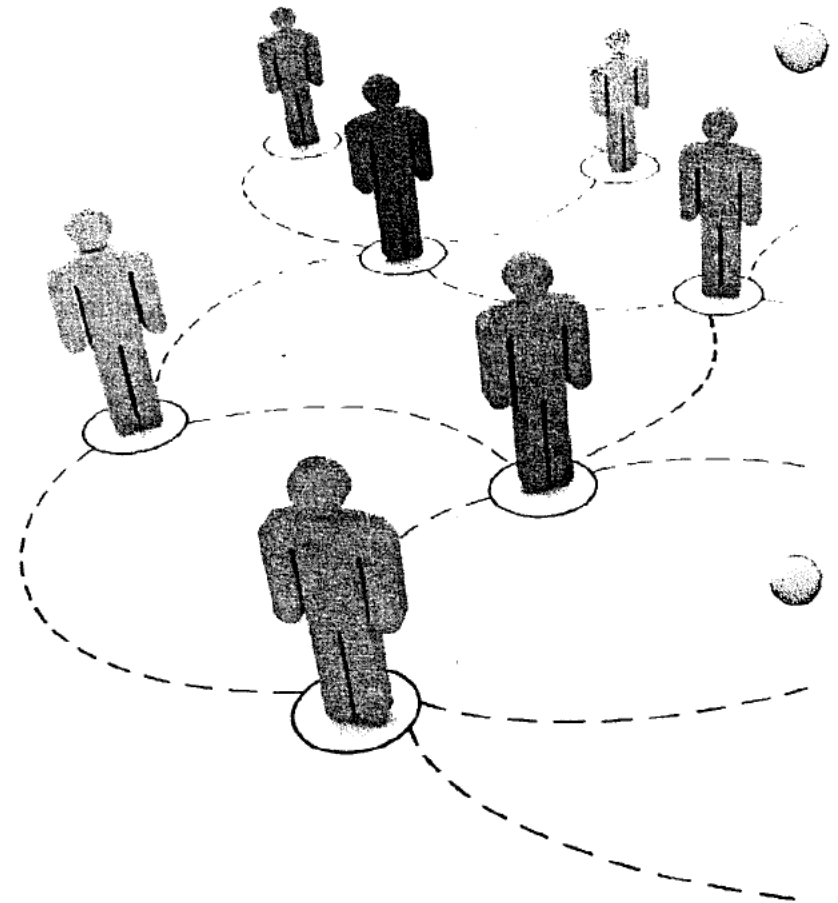
- Leverage expertise of WMATA and form strong partnership to ensure success
- Bring leadership on site during implementation and maintain presence through post-implementation for smooth transition
- Many implementation activities will be very similar to our standard implementation approach
- Conduct frequent meetings and foster open communication with OCC and Service Delivery contractors as we currently do in standard NEMT implementations

Implementation

- Leverage depth of organization for smooth implementation:

- Technology resources
- QA team
- WMATA –experienced staff

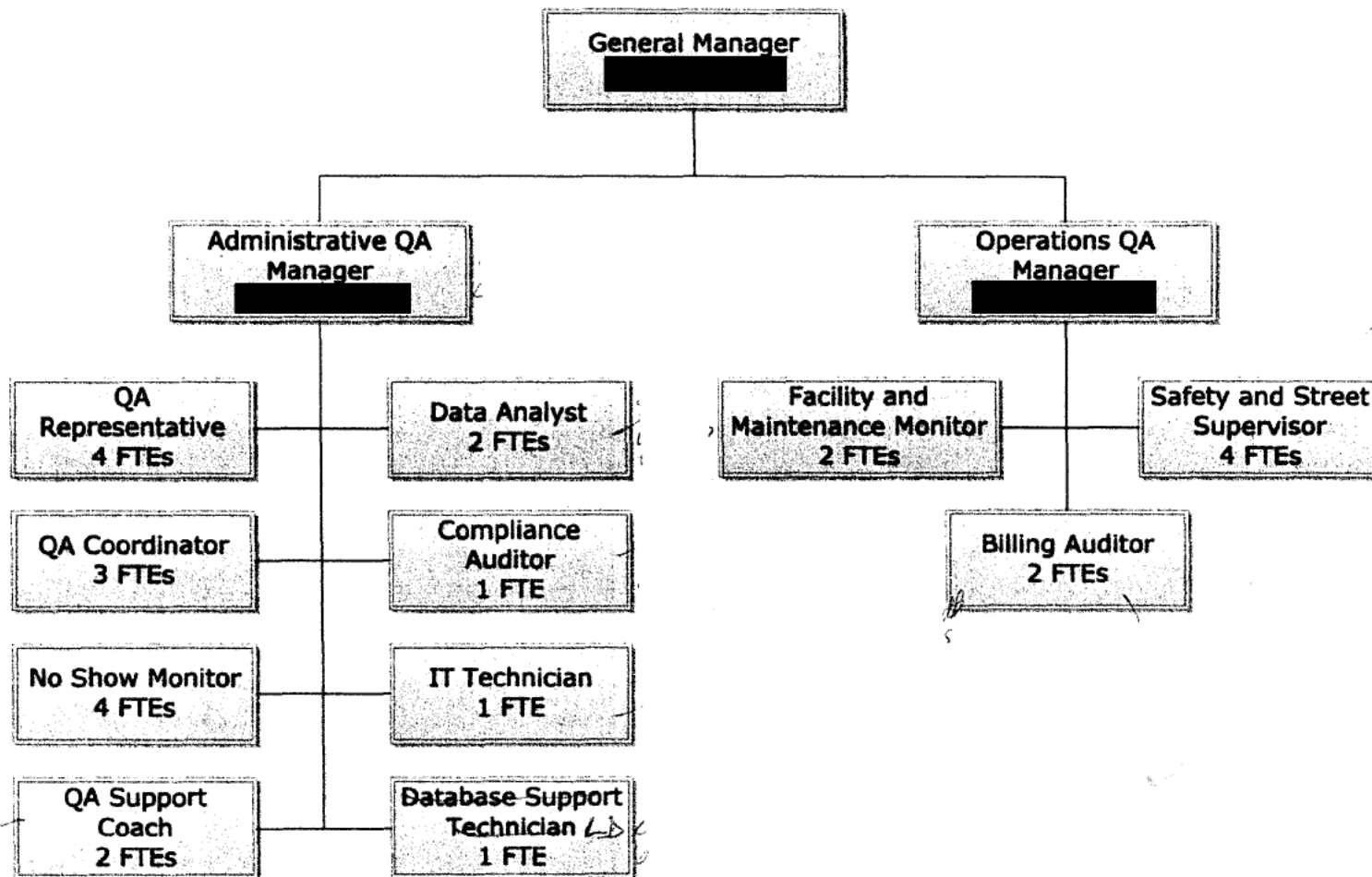
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]



Implementation

- Staffing
 - Bring management positions on board upon contract award for training and implementation planning (estimated April 1)
 - Start recruitment efforts for lower level positions upon contract award
 - Utilize a certified small business staffing vendor
 - Recruit current contractor's employees
 - Currently recruit for similar positions on a regular basis through our DC Medicaid NEMT contract
 - Work with state employment office and social service agencies, attend local job fairs, and post listings on the internet to fill open positions

Staffing



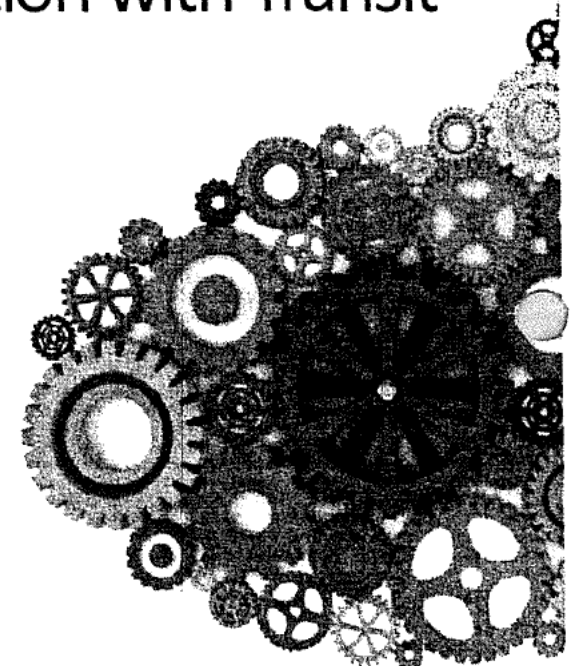
WMATA Material Support

- Facility and employee parking
- Storage for eight vehicles to be used for on-street monitoring
- Access to Trapeze , COGNOS, Maximo, Avaya, NICE, SMS, DriveCam, and EZ-Pay
- Dedicated IT resource during implementation
- Current, effective policies and procedures
- Existing tools, i.e. inspection forms



Data Integration

- Data integration through Transit Miner
- Work closely with WMATA during implementation to demonstrate capabilities and build customized solutions
- Data points we will track through integration with Transit Miner:
 - Productivity
 - On-time performance
 - Cost
 - Complaints

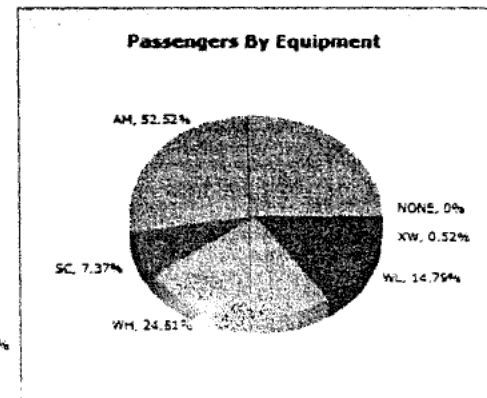
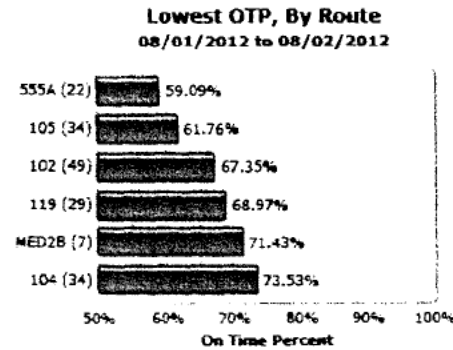
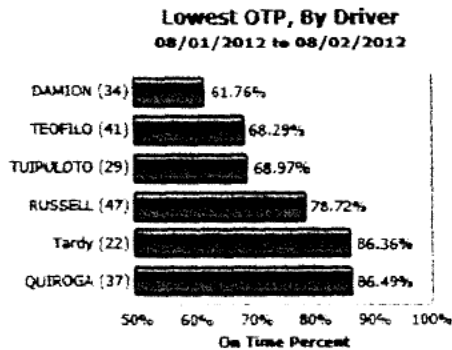
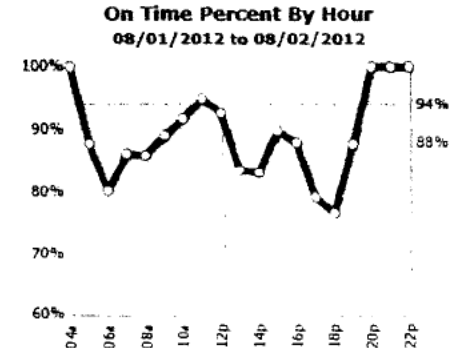
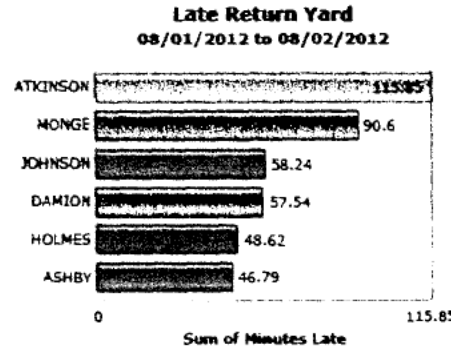
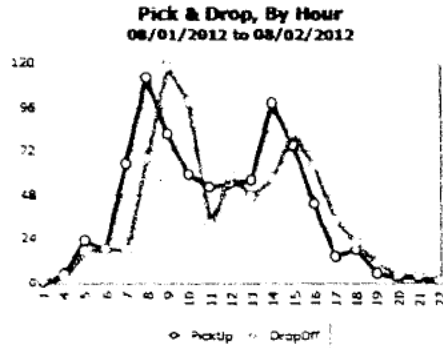


Data Integration

Home Reports Graphs Dashboards Mapping Administer Import Tutorials Logout

Sample Dashboard Report Options

From: 08/01/2012 To: 08/02/2012

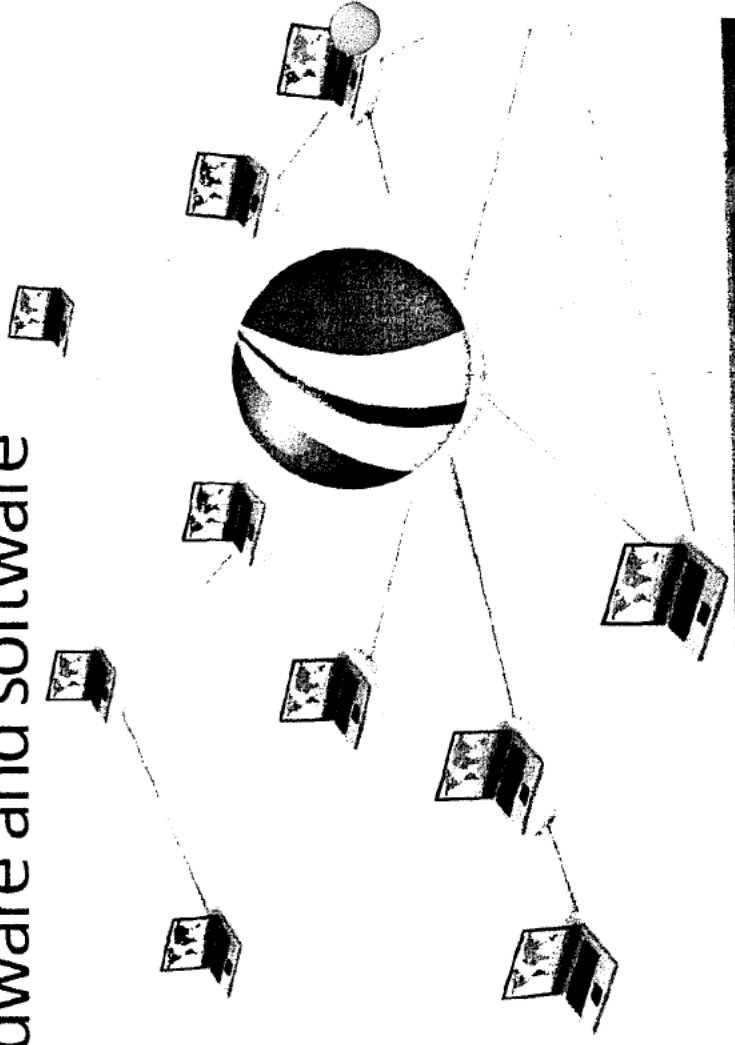


Sample
Transit
Miner
Dashboard



IT Support

- Onsite IT Technician
- Corporate back-up IT support
- Vendor support for hardware and software



Employee Benefit Participation

- Benefit participation company-wide: 55%
- Anticipated participation on this contract: 76%
- MTM employer contribution rates for medical coverage exceed both national and industry averages
- Reasons for not participating include:
 - Coverage through spouse
 - Choosing to forego health coverage



Transportation
Management

Questions?



[REDACTED]

From: [REDACTED]
Sent: Tuesday, December 18, 2012 10:17 AM
To: [REDACTED]@mtm-inc.net
Cc: [REDACTED]; [REDACTED]; [REDACTED];

Subject: RFP CQ12169/KAM
Attachments: DOC.pdf

Good Morning [REDACTED]:

WMATA has scheduled discussions for Thursday, December 20, 2012 with Medical Transportation Management regarding your proposal for Quality Assurance. Please see the attached letter for your response.



December 18, 2012

[REDACTED]
CEO
Medical Transportation Management
16 Hawk Ridge Drive,
Lake Saint Louis, MO 63367

Reference: RFP CQ12169/KAM
Request for Discussion

Dear [REDACTED]:

The Washington Metropolitan Area Transit Authority (WMATA) acknowledges receipt of your Technical and Price Proposals in response to Solicitation, RFP CQ12169/KAM – Metroaccess Paratransit Service for Maryland, Virginia and the District of Columbia. Your proposal is determined to be in the competitive range.

WMATA's evaluation of your proposal has identified areas that require discussion with your Company. The areas are as follows:

- Have the proposed project manager discuss his experience and anticipated challenges.
- Talk about the startup, to include the timeline and recruitment of staff. What kind of Corporate and WMATA support is anticipated? Have you ever done a startup like this before?
- * • Talk in detail about the various positions you have proposed and what these people will do. Why did you chose to propose the number of each position type you did and how you expect to staff the operation on a daily basis (shifts, etc.)?
- Talk about the kind of material support you anticipate getting from WMATA, to include facilities and IT systems & data.
- Discuss how you will access and integrate WMATA's data and IT systems into your operational plans; and IT support capabilities.
- * • Describe the function of the various positions you proposed and why did you propose the number of each type of position that you did.
- Explain your expected benefit participation percentage of 55%. Why is it so low?

**Washington
Metropolitan Area
Transit Authority**

600 Fifth Street, NW
Washington, D.C. 20001
202/962-1234

*By Metrorail:
Judiciary Square-Red Line
Gallery Place-Chinatown
Red, Green and
Yellow Lines*

*A District of Columbia
Maryland and Virginia
Transit Partnership*

Page 2
Request for Discussion

You are encouraged to invite your IT person and anyone else relevant to this project.

The performance requirement of Quality Assurance is crucial to the success of this project. Therefore, you should be prepared to discuss the overall performance as described in the RFP. This discussion is scheduled for Thursday, December 20, 2012 at 9:00 A.M., via skype or other acceptable video system. Please provide Ms. McSween with a contact person who will be setting up the video for the discussion, by 10:00 A.M. tomorrow morning.

Should you have any questions, please contact [REDACTED] at (202) 962-[REDACTED] or [REDACTED]@wmata.com.

Sincerely,

[REDACTED]

[REDACTED]
Contracting Officer
Office of Procurement and Materials

Attachments

Attachments

Attachment A	Amended Start-Up/Transition Plan
Attachment B	Sample Reporting Package
Attachment C	Incident Policy
Attachment D	Resume
Attachment E	Sample Calibration Report
Attachment F	Sample Annual Evaluation Report

[REDACTED]

From: [REDACTED]
Sent: Tuesday, December 11, 2012 11:24 AM
To: [REDACTED]
Subject: RE: RFP CQ12169/KAM, Clarifications for Quality Assurance Cost Proposal

E-mail received. Thank you

From: [REDACTED] [mailto:[REDACTED]@mtm-inc.net]
Sent: Tuesday, December 11, 2012 11:12 AM
To: [REDACTED]
Subject: RFP CQ12169/KAM, Clarifications for Quality Assurance Cost Proposal

[REDACTED] please find attached our clarifications for RFP CQ12169/KAM in response to your email dated December 7, 2012. If you have any questions or require additional information, please don't hesitate to contact me. It would be much appreciated if you could confirm receipt of this email and attachment. Thank you for your consideration.

[REDACTED]
Vice President, Marketing, MTM, Inc.
ph. [REDACTED] | cell. [REDACTED]
16 Hawk Ridge Drive, Lake Saint Louis, MO 63367
www.mtm-inc.net

This communication contains information that is confidential and is solely for the use of the intended recipient. It may contain information that is privileged and exempt from disclosure under applicable law. If you are not the intended recipient of this communication, please be advised that any disclosure, copying, distribution or unauthorized use of this communication is strictly prohibited. Please also notify MTM at 1-888-561-8747 and return the communication to the originating address.

Supply and Service Contract RFP CQ12169/KAM
Paratransit Service for Maryland, Virginia, and the District of Columbia

Quality Assurance
Response to Clarification

Prepared for
Washington Metropolitan Transit Authority (WMATA)

Submitted by
Medical Transportation Management, Inc. (MTM)

December 11, 2012

Table of Contents

Position Descriptions and Salary Ranges	2
Fringe Benefits	2
Profit and Contingency	3
Other Ancillary Costs.....	3
Taxes	3
Assumed Participation in the Employee Benefit Plan	3
Statement of Intent to Contract	4
Representations and Certifications	4
Attachments.....	5

Position Descriptions and Salary Ranges

Medical Transportation Management, Inc. (MTM) has determined salary ranges for all proposed positions as follows:

Position	Salary Range
General Manager	\$94,000 - \$114,000
Administrative QA Manager	\$62,800 - \$82,800
Operations QA Manager	\$69,040 - \$89,040
Billing Auditor	\$26,200 - \$36,200
Facility and Maintenance Monitor	\$23,900 - \$33,900
Safety and Street Supervisors	\$26,200 - \$36,200
QA Representative	\$23,900 - \$33,900
QA Coordinator	\$35,000 - \$45,000
Compliance Auditor	\$45,000 - \$55,000
No Show Monitor	\$32,500 - \$42,500
QA Support Coach	\$26,200 - \$36,200
Data Analyst	\$47,000 - \$57,000
Database Support Technician	\$26,200 - \$36,200
IT Technician	\$32,440 - \$42,440

Position Descriptions for all of the above noted roles are located within **Attachment A**.

Fringe Benefits

MTM has broken down, as a percentage of gross pay, all fringe benefit cost elements in the following table:

Fringe Benefit	Percentage
Payroll taxes	7.65%
Federal and State unemployment tax	0.78%
Group insurance	6.70%
Group life, short and long term disability	0.53%
401k retirement and deferred comp	1.67%
Worker's comp	0.67%
Total	18.00%

Profit and Contingency

The net profit and contingency is 7% of the total annual cost of the WMATA Quality Assurance program. This target net profit rate is established by MTM's management to provide a reasonable rate of return to shareholders and provide a reasonable contingency for the inherent risks in our pricing model due to the use of estimates.

Other Ancillary Costs

Administrative support is an allocation of MTM corporate overhead and back office costs used to support the WMATA Quality Assurance program. Those services consist of systems support, accounting and billing, human resources, legal, audit, and general executive oversight and support.

Section 5.6.2 of the RFP indicates that "the contractor shall provide ongoing maintenance and replacement of the above items as needed." MTM has established a reasonable annual budget to replace or repair desks, cubicles, chairs, computers, peripherals, telephone headsets, etc. as needed.

MTM has assumed the purchase of eight Toyota Priuses for the use of the Safety and Street Supervisors. The vehicles are depreciated on a straight line basis over an estimated five year life.

Taxes

Taxes are based upon an estimate of taxes paid to the District of Columbia. The taxes included are the DC Franchise Tax and the DC Ballpark Fee. Each tax is based upon revenue and/or net income earned in DC.

Assumed Participation in the Employee Benefit Plan

In determining the employee benefit cost, a flat 18% of salaries was assumed. This is based upon MTM's actual global benefit cost as a percent of the actual salary cost. By using this percent, MTM is in effect providing a weighted average of all participants in the plan. We used our internal employee participation percentage of 55% as the basis of our assumption.

Statement of Intent to Contract

Please refer to **Attachment B** for a dually executed Statement of Intent to Contract between Cheshil Consultants, Inc., and MTM. This document, which outlines annual total dollar amount for all base and option years, states that the subcontractor is aware of their utilization and that they are in agreement with our terms and condition.

Representations and Certifications

A modified Buy America Act Certification is provided within **Attachment C**.



Attachments

Attachment A

Position Descriptions

Attachment B

Statement of Intent to Contract

Attachment C

Buy America Act Certification

Attachment A



<p style="text-align: center;">Job Description</p>		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	Washington, D.C.		
		Origination Date	7/5/12		
Job Title	WMATA QA General Manager	Last Revision Date	12/10/12		
Department	Quality Management				
Reports to	VP of Operations	Page	1	OF	2

POSITION SUMMARY:

The most important duty of the General Manager is to be responsive to WMATA and be timely on deliverables. The General Manager directs operations of QA. Duties include daily communication and interaction with staff and direct reports. The General Manager must also organize and conduct activities related to the review and monitoring of MetroAccess service to assure safe, cost-effective, operating performance. It is expected that the QA General Manager will meet with WMATA at least once per week on all matters associated with the contractor's responsibilities for this project. The QA General Manager will be available when requested by WMATA for attendance at meetings with the public, advisory groups, or other meetings as required for MetroAccess.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Proficiency with Microsoft Outlook, Microsoft Word, Microsoft Excel, Trapeze, SQL query writing, Crystal Reports, and other standard software applications.
- Ability to type 30wpm or greater.
- Excellent interpersonal skills and the ability to work both independently and as part of a team.
- Exemplary written and oral communication skills.
- Ability to multi-task, prioritize work, and collaborate effectively under pressure.
- Ability to handle confidential information in a professional manner.
- Ability to be responsive to WMATA and achieve all deliverables in a timely manner.
- Expert knowledge of MetroAccess program requirements.
- Superior management capabilities.
- Intricate customer service skills.
- Superior problem solving skills.
- Ability to conduct financial analysis and forecasting.
- Ability to prepare and present comprehensive reports and briefings.

EDUCATION/EXPERIENCE:

As a minimum, the individual must have at least five years of management experience on large contracts of a highly technical nature. Additionally, a bachelors degree in accounting, business administration, information technology, public policy, statistics, transportation planning, or a related field from an accredited college or university is required, but may be substituted with five additional years of public transit experience. The individual also must also demonstrate a high level of customer service commitment.

POSITIONS SUPERVISED: Administrative QA Manager and Operations QA Manager.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, slide projector, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job requires sitting at a desk, talking on the phone, a high level of data entry, and viewing a computer screen for the majority of the day. Job may

require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pound and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Signature: _____

Title: _____

Date: _____


This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources

Cc: Employee's Supervisor
Employee

Job Description



		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	Washington, D.C.		
		Origination Date	7/5/12		
Job Title	WMATA Administrative QA Manager	Last Revision Date	12/10/12		
Department	Quality Management				
Reports to	WMATA QA General Manager	Page	1	OF	2

POSITION SUMMARY: The Administrative QA Manager is responsible for staff performance in conducting monitoring and review functions of the MACS-OCC as well as customer service investigation and response, and Late Cancellation and No Show Policy review, in compliance with WMATA policies and procedures. The Administrative QA Manager will be responsive to WMATA and timely on deliverables, and interfaces primarily with the MACS-OCC Contractor and resolves complaints to ensure that safe and professional high quality customer service is emphasized and reinforced in all phases of service to MetroAccess customers.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Demonstrated ability to observe, document, and evaluate paratransit operations, including the ability to identify problems that affect service, and to develop and implement effective solutions to complex operational and technical problems.
- Demonstrated ability to effectively interpret and analyze data, and ability to prepare and present comprehensive technical reports and briefings.
- Demonstrated success in completing difficult assignments displaying innovative solutions to complex problems.
- Proficiency in the review, coordination, and monitoring of contractor invoicing/payment disbursement.
- Demonstrated ability to conduct financial analysis and forecasting, to coordinate payables/ revenue accruals, and to assist management with cost impact studies and trend analysis.
- Proficiency with Microsoft Outlook, Microsoft Word, Microsoft Excel, Trapeze, SQL query writing, Crystal Reports, and other standard software applications.
- Expert knowledge of MetroAccess program requirements.
- Ability to multi-task, prioritize work, and collaborate effectively under pressure.

EDUCATION/EXPERIENCE:

- At least five years of management experience with large urban ADA paratransit services, and at least seven years total experience in public transportation.
- A Bachelors degree from an accredited college or university is required, but may be substituted with five additional years of public transit experience.
- A working knowledge of Trapeze PASS paratransit software suite or event-based paratransit application is required and a detailed understanding of Trapeze is a plus.
- Demonstrated history of high performance in customer service.

POSITIONS SUPERVISED: QA Representative, Data Analyst, QA Coordinator, Compliance Auditor, No Show Monitor, IT Technician, QA Support Coach, and Database Support Technician.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, slide projector, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job requires sitting at a desk,

talking on the phone, a high level of data entry, and viewing a computer screen for the majority of the day. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pound and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Signature: _____

Title: _____

Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.


Original: Human Resources

Cc: Employee's Supervisor

Employee

Job Description



		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	Washington, D.C.		
		Origination Date	7/5/12		
Job Title	WMATA Operations QA Manager	Last Revision Date	12/10/12		
Department	Quality Management				
Reports to	WMATA QA General Manager	Page	1	OF	2

POSITION SUMMARY:

The Operations QA Manager is responsible for performance of staff conducting trip, vehicle, and facility inspections, incident response and reporting, and data review, in compliance with the policies of WMATA. The Operations QA Manager will be responsive to WMATA and timely on deliverables, and is responsible for monitoring and reviewing daily system performance and quality assurance functions for service operations. The Operations QA Manager interfaces primarily with Service Delivery Contractors and resolves complaints to ensure that safe and professional high quality customer service is emphasized and reinforced in all phases of service to MetroAccess customers.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Demonstrated ability to observe, document, and evaluate paratransit operations, including the ability to identify problems that affect service, and to develop and implement effective solutions to complex operational and technical problems.
- Demonstrated ability to effectively interpret and analyze data, and ability to prepare and present comprehensive technical reports and briefings.
- Knowledge and understanding of and sensitivity to the travel needs of persons with disabilities, including related accessibility/mobility issues.
- Proficiency with Microsoft Outlook, Microsoft Word, Microsoft Excel, Trapeze, SQL query writing, Crystal Reports, and other standard software applications.
- Ability to multi-task, prioritize work, and collaborate effectively under pressure.
- Expert knowledge of MetroAccess program requirements.

EDUCATION/EXPERIENCE:

- At least five years of management experience with large urban ADA paratransit services, and at least seven years total experience in public transportation.
- A Bachelors degree from an accredited college or university is required, but may be substituted with five additional years of public transit experience.
- A working knowledge of Trapeze PASS paratransit software suite or event-based paratransit application is required and a detailed understanding of Trapeze is a plus.
- Demonstrated history of high performance in customer service.

POSITIONS SUPERVISED: Facility and Maintenance Monitor, Safety and Street Supervisor, and Billing Auditor.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, slide projector, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job requires sitting at a desk, talking on the phone, a high level of data entry, and viewing a computer screen for the majority of the day. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pound and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Signature: _____


Title: _____

Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources
Cc: Employee's Supervisor
Employee



Job Description 		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	Washington, D.C.		
		Origination Date	10/26/12		
Job Title	Billing Auditor	Last Revision Date	12/10/12		
Department	Quality Management				
Reports to	Operations QA Manager	Page	1	OF	3

POSITION SUMMARY: The Billing Auditor will work individually or as part of a team conducting audits of claims and data submitted by the OCC and Service Delivery contractors to verify accuracy and compliance with prescribed policies and procedures. The Billing Auditor will be responsible for checking and verifying process efficiencies against source documents and records, and auditing work procedures and methods. The Billing Auditor will also assist in preparation of audit reports and making recommendations for improvements and modifications in systems and procedures of areas audited.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Auditing and Compliance	<ul style="list-style-type: none"> Audit data and claims to ensure compliance and process efficiency. Conduct reviews and work with Operations QA Manager to update policies and procedures as required. Monitor and report issues of non-compliance to the Operations QA Manager. Compile weekly/monthly summaries of audit investigations, findings, and resolutions. Verify internal controls are properly in place to ensure continuous functioning of auditing process. Create relevant procedures, audit tools, and tracking mechanisms. Conduct ad hoc audits as assigned. 	Audit of spreadsheets for weekly/monthly reviews and reports	40%
Process Improvement and analysis	<ul style="list-style-type: none"> Provide non-conformance reviews and recommend process improvements. Monitor and improve the efficiency and output of processes through observations and measurements, as well as through collection and interpretation of data from other operating personnel. Facilitate meetings to gather and document requirements and explore potential solutions. Develop methods and procedures to identify whether current processes and objectives meet contract needs. Promote process improvements throughout the company. Compile weekly/monthly summary reports. 	Review of Weekly/Monthly Reports and Operations Dashboard	40%
Risk Issues	<ul style="list-style-type: none"> Identify potential risk issues and develop viable and cost-effective solutions. Create process change by integrating new processes with existing processes and communicate changes to appropriate department heads and staff. Establish scheduled project reviews and quality assurance procedures. Facilitate team and stakeholder meetings effectively. 	Review of Weekly/Monthly Reports and Operations Dashboard Proven decrease in risk related issues	20%

	<ul style="list-style-type: none"> • Assist and guide process owners in the assessment of processes for improvement and standardization opportunities. • Lead project plans and provide direction for root cause analysis and corrective action of non-conformances, minimize rework, reduce cost, and improve quality output. 		
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OTHER JOB FUNCTIONS:

- Manage day-to-day execution of assigned projects and scope.
- Act as back-up to co-workers as required.
- Serve on MTM committees as assigned.
- Conduct all activities in a timely and responsible manner.
- Maintain strong working knowledge of all department responsibilities.
- Other duties as assigned.
- Regular attendance required.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Extensive knowledge of Trapeze, Microsoft Outlook, Microsoft Word, and Microsoft Excel.
- Exemplary verbal and written communication skills.
- Excellent organizational and multi-tasking skills.
- Ability to tactfully question and obtain necessary information from OCC and Service Delivery contractors.
- Ability to handle confidential information in a professional manner.
- Ability to make solid judgment calls required.
- Extensive knowledge of MetroAccess protocols.

EDUCATION:

- Bachelor's degree required, preferably in relevant field.

EXPERIENCE:

- A minimum of three years corporate auditing experience required.
- A minimum of one year quality related experience required.
- Previous experience in process improvement facilitation, including documenting business processes, controls, and models required.
- Must display proven ability to apply professional concepts, experience, and company objectives in order to perform an in-depth analysis of situations or data to resolve complex issues in creative ways.

POSITIONS SUPERVISED:

None

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, slide projector, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job requires sitting at a desk, talking on the phone, a high level of data entry, and viewing a computer screen for the majority of the day. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pounds and carry objects 50 feet. This position may require both local and overnight travel.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print): _____

Supervisor Signature: _____

Title: _____

Date: _____


This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources

Cc: Employee's Supervisor
Employee



Job Description

		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	Washington, D.C		
		Origination Date	12/10/12		
Job Title	Facility and Maintenance Monitor	Last Revision Date	12/10/12		
Department	Quality Management				
Reports to	Operations QA Manager	Page	1	OF	2

POSITION SUMMARY: The Facility and Maintenance Monitor ensures Service Delivery contractors maintain appropriate internal operations and store vehicles in a safe manner. The Facility and Maintenance Monitor will perform regularly scheduled and unscheduled on-site visits, during which they will inspect the contractor's compliance to WMATA's requirements and applicable laws and regulations. S/he will also audit files and records (including maintenance records and driver qualifications), educate the contractor, review any areas of deficiency, and schedule a return visit to ensure any issues are rectified.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Overseeing Maintenance	<ul style="list-style-type: none"> Assure proper procedure is followed in attending to maintenance issues. Work closely with Service Delivery contractors to help find cost saving opportunities with daily operations. 	95% or greater compliance	50
Ensuring Safe Service Delivery	<ul style="list-style-type: none"> Coordinate with contractors to ensure vehicles meet all requirements. Assign PIPs as appropriate for any issues. Assure contractors meet the required deadlines for PIPs and performance improvement. 	95% or greater compliance	50

KNOWLEDGE, SKILLS, AND ABILITIES:

- Strong interpersonal skills.
- Ability to work independently with minimal supervision.
- Self-motivation and superior time management skills.
- Knowledge of, or ability to learn, Microsoft Outlook, Microsoft Word, Microsoft Excel, and Trapeze.
- Proven experience dealing with conflict management.
- Knowledge of appropriate maintenance processes.
- Willingness and ability to travel locally within the District of Columbia 75+% of the time.
- Valid/current driver's license and a clean driving record.
- Flexibility to work a variety of work schedules/hours.
- Extensive knowledge of MetroAccess protocols.

EDUCATION:

- High School Diploma and some college coursework required.
- Four year or graduate degree in Business Administration, or a related field preferred.

EXPERIENCE:

- Minimum of one year experience in Business Administration required.
- Knowledge of equipment and maintenance management preferred.

POSITIONS SUPERVISED:

None.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, printer, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pound and carry objects 50 feet. Position may require both local and overnight travel.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print): _____

Supervisor Signature: _____

Title: _____

Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Administration
Cc: Employee's Supervisor
Employee



<h2 style="text-align: center;">Job Description</h2>		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	Washington, D.C.		
		Origination Date	6/10/08		
Job Title	Safety and Street Supervisor	Last Revision Date	12/10/12		
Department	Quality Management				
Reports to	Operations QA Manager	Page	1	OF	2

POSITION SUMMARY: The Safety and Street Supervisor is responsible for ensuring WMATA's Service Delivery contractors meet and exceed compliance and operational requirements. This includes performing random and/or scheduled site visits and inspections, as well as monitoring driver performance in the field. The Safety and Street Supervisor performs annual vehicle inspections to ensure vehicle compliance with all WMATA, ADA, and other Federal and local regulatory standards. The Safety and Street Supervisor will also pose as a passenger to perform periodic mystery rider activities.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Vehicle Inspections/ Compliance	<ul style="list-style-type: none"> Perform vehicle inspections to ensure vehicle compliance with all ADA and other Federal, State and Local regulatory standards. 	Vehicle inspections	40
Random Visits/On Street Observations	<ul style="list-style-type: none"> Perform scheduled and random visits to verify level of service and contractor adherence to contract standards. Perform onsite visits and street observations of Service Delivery contractors. Perform on-street observations of vehicles, drivers, and services. Document on-street observations and provide input to contractors on both positive and negative findings. 	Site visits	40
Planning and Documentation	<ul style="list-style-type: none"> Plan and document work schedule and provide follow up reports on a regular basis. 		10
Investigates adherence to service requirements	<ul style="list-style-type: none"> Investigate quality of contractors' on-time performance and driver adherence to service requirements 	Performance data	10

OTHER ESSENTIAL JOB FUNCTIONS:

- Regular attendance.
- Other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Strong interpersonal skills.
- Basic knowledge of the District of Columbia, along with ability to read and follow maps.
- Ability to work independently with minimal supervision.
- Self-motivation and superior time management skills.
- Knowledge of or ability to learn, Microsoft Outlook, Microsoft Word, Microsoft Excel, and Trapeze.
- Proven experience dealing with conflict management.
- Willingness and ability to travel locally within the District of Columbia 75+% of the time.

- Valid/current driver's license and a clean driving record.
- Flexibility to work a variety of work schedules/hours.
- Extensive knowledge of MetroAccess protocols.

EDUCATION:

High school degree or equivalent.

EXPERIENCE:

- Transportation and/or vehicle maintenance experience, preferred.
- Prior audit experience and/or knowledge of Medicaid guidelines, preferred.

POSITIONS SUPERVISED:

None.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, laptop.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pound and carry objects 50 feet. Position may require both local and overnight travel.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print): _____

Supervisor Signature: _____

Title: _____


Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources
Cc: Employee's Supervisor
Employee

Job Description



		Exempt			
		Non-exempt		X	
		Full-time		X	
		Part-time			
		Location		Washington, D.C.	
		Origination Date		02/19/10	
Job Title	QA Representative	Last Revision Date		12/10/12	
Department	Quality Management				
Reports to	Administrative QA Manager	Page	1	OF	2

POSITION SUMMARY: The QA Representative is responsible for general Quality Assurance support. This includes ensuring prompt response to all queue calls from passengers regarding the service provided by the OCC and Service Delivery contractors. The QA Representative will be an integral part of the complaints resolution process, and will document all circumstances surrounding a complaint/compliment to ensure quick and appropriate resolution. The QA Representative may also recommend PIPs as appropriate.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Manage Complaints	<ul style="list-style-type: none"> • Respond promptly to all complaints received. • Ensure thorough and concise documentation of all complaints lodged. • Enter data for the application of PIPs and liquidated damages. 	Call Stats Daily, weekly, monthly complaint reports QM Inter-Rater Daily Task List	75%
Risk Management	<ul style="list-style-type: none"> • Provide notification to the Administrative QA Manager when an accident/incident is reported to MTM. 	Email notification	15%
Interdepartmental Communication	<ul style="list-style-type: none"> • Provide departmental support as needed. 	Complaint Reports Email notification	10%

OTHER JOB FUNCTIONS:

- Document complaints and all supporting data.
- Enter data for the application of Liquidated Damages.
- Other duties as assigned.
- Regular attendance required.
- Job share with other QSRs to ensure adequate coverage during inclement weather and sick days.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Typing speed of 30 WPM or greater.
- Knowledge of or ability to learn, Microsoft Outlook, Microsoft Word, Microsoft Excel, and Trapeze.
- Exemplary communication and phone skills.
- Ability to relate to a diversity of customers and requests.
- Ability to identify with customer needs and circumstances.
- Extensive knowledge of MetroAccess protocols.

EDUCATION:

- High School Diploma or G.E.D. required.

EXPERIENCE:

- Previous Customer Service experience required.

POSITIONS SUPERVISED:

None.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, slide projector, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job requires sitting at a desk, talking on the phone, a high level of data entry, and viewing a computer screen for the majority of the day. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pounds and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print): _____

Supervisor Signature: _____

Title: _____


Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources
Cc: Employee's Supervisor
Employee

Job Description



		Exempt	X	
		Non-exempt		
		Full-time	X	
		Part-time		
		Location	Washington, D.C.	
		Origination Date	6/11/04	
Job Title	QA Coordinator	Last Revision Date	12/10/12	
Department	Quality Management			
Reports to	Administrative QA Manager	Page	1	OF 2

POSITION SUMMARY: The QA Coordinator helps QA Representatives with the management of complaints in accordance with WMATA requirements and MTM's policies and procedures.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Manage Complaints	<ul style="list-style-type: none"> • A working knowledge of all protocols. • Document, review, investigate, and provide follow up for all complaints and issues reported. • Enter complaints submitted via fax or voice mail. • Contact to complainant in regards to complaint resolution. • Enter data for the application of PIPs and liquidated damages. • Obtain timely responses from contractors to aid in the resolution process. • Provide immediate follow up for complaint responses that are not submitted within the specified timeframe and enforce disciplinary measures as needed. • Provide and document all contractor education given in response to complaints. • Respond to inquiries sent via email, or fax within the specified timeframe. • Send complaint resolution letters to complainant per contract requirements. 	Call Stats Daily, weekly, monthly complaint reports QM Inter-Rater Daily Task List	60%
Complaint Reports	<ul style="list-style-type: none"> • Compile daily/weekly/monthly complaint reports for WMATA. • Track and trend complaint ratios for contractors. • Provide monthly/year-to-date data reflected on monthly quality reports. 	Daily, weekly, monthly complaint reports	20%
Interdepartmental Communication	<ul style="list-style-type: none"> • Assist departmental/contractor issues. • Update management in regards to non-compliance issues with contractors and advise of incident/accident issues. 	Complaint Reports Email notification	10%
Independently manage trips with issues, complaints, or special needs	<ul style="list-style-type: none"> • Triage issues, complaints, and unusual trip circumstances and determine appropriate action by reviewing complaint history, trip history, etc. • Determine changes needed and implement them accordingly. 	Complaint Reports	10%

OTHER JOB FUNCTIONS:

- Update client statistics as needed.
- Other duties as assigned.
- Regular attendance required.
- Attend client/implementation meetings upon request.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Knowledge of or ability to learn, Microsoft Outlook, Microsoft Word, Microsoft Excel, and Trapeze.
- Excellent written communication skills, with an emphasis on grammar and spelling.
- Ability to tactfully question and obtain information.
- Excellent organizational and interpersonal skills.
- Demonstrated ability to manage multiple priorities.
- Typing speed of 30 WPM or greater.
- Ability to handle confidential information in a professional manner.
- Superior problem solving skills.
- Extensive knowledge of MetroAccess protocols.

EDUCATION:

- High School Diploma or G.E.D. required.
- Some college preferred.

EXPERIENCE:

- Previous customer service experience required.
- Previous Quality Management experience preferred.

POSITIONS SUPERVISED:

None.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, slide projector, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job requires sitting at a desk, talking on the phone, a high level of data entry, and viewing a computer screen for the majority of the day. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pounds and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print): _____

Supervisor Signature: _____

Title: _____

Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.


Original: Human Resources

Cc: Employee's Supervisor

Employee

Job Description



		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	Washington, D.C.		
		Origination Date	4/10/07		
Job Title	Compliance Auditor	Last Revision Date	12/10/12		
Department	Quality Management				
Reports to	Administrative QA Manager	Page	1	OF	2

POSITION SUMMARY: The Compliance Auditor is responsible for the oversight and provision of timely investigation, reporting, and follow-up of identified audit processes.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Auditing and Compliance	<ul style="list-style-type: none"> • Conduct audits as assigned. • Perform audit activities as assigned for compliance processes relating to WMATA contractors and internal MTM operations. • Audit MTM policies, procedures, manuals, and processes to ensure compliance with contracts and WMATA requirements. • Conduct, review, and update policies/procedures as assigned. • Monitor and report issues of non-compliance. • Compile weekly/monthly summaries of audit investigations, findings, and resolutions as required. • Verify internal controls are in place to ensure continuous functioning of auditing process. • Create relevant workflows, audit tools, and tracking mechanisms. • Conduct monitoring, reporting, and follow-up on all PIPs. • Conduct quality improvement projects for the Quality Improvement Program as assigned. 	Audit spreadsheets Weekly/monthly reviews and reports	50%
Fraud, Waste, and Abuse Prevention and Management	<ul style="list-style-type: none"> • Review and follow-up of fraud alerts and other fraud issues and compile appropriate reports as assigned. • Perform appropriate trip monitoring and tracking. • Create relevant workflows, audit tools, tracking/monitoring spreadsheets and reports for audit investigations and findings. • Compile weekly/monthly summary reports. 	Weekly/monthly reviews and reports. Dashboard	40%
Risk Issues	<ul style="list-style-type: none"> • Monitor and report accident/incident issues. • Maintain protocol for tracking all accident/incident issues. • Compile weekly/monthly summary reports. 	Weekly/monthly reviews and reports Dashboard	10%

OTHER JOB FUNCTIONS:

- Apply policies/procedures and contract obligations to designated audits.
- Update client statistics as needed.
- Act as back-up to co-workers as required.
- Serve on MTM committees as assigned.
- Other duties as assigned.
- Regular attendance required.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Proficiency with Microsoft Word, Microsoft Excel, Microsoft Outlook, and Trapeze.
- Excellent written communication and problem-solving skills.
- Excellent organizational, interpersonal, and teamwork skills.

- Ability to multi-task in a fast-paced environment.
- Ability to handle confidential information in a professional manner.
- Ability to make solid judgment calls.
- Knowledge of all departmental and contractual responsibilities.
- Extensive knowledge of MetroAccess protocols.

EDUCATION:

- High School Diploma or G.E.D. required.
- College degree preferred.

EXPERIENCE:

- A minimum of one year of quality related experience required.
- Previous auditing experience preferred.

POSITIONS SUPERVISED:

None.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, slide projector, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job requires sitting at a desk, talking on the phone, a high level of data entry, and viewing a computer screen for the majority of the day. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pounds and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print): _____

Supervisor Signature: _____

Title: _____

Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources

Cc: Employee's Supervisor
Employee



<h2 style="text-align: center;">Job Description</h2>		Exempt	
		Non-exempt	X
		Full-time	X
		Part-time	
		Location	Washington, D.C.
		Origination Date	01/12/06
Job Title	No Show Monitor	Last Revision Date	12/10/12
Department	Quality Management		
Reports to	Administrative QA Manager	Page	1 OF 2

POSITION SUMMARY: The primary job function of the No Show Monitor is to prevent no shows and late cancellations, reviewing all occurrences to ensure they were handled appropriately. The No Show Monitor also educates passengers on the correct process for cancelling trips. The No Show Monitor will enter all cancellation information into Trapeze and communicate with the OCC and Service Delivery contractors to obtain further details; s/he may also implement corrective action as necessary.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Manage no shows process	<ul style="list-style-type: none"> Identify passengers who continually no show for scheduled trips. Make outbound calls to provide education regarding the no show process as defined by WMATA. Ensure thorough and concise documentation of all no show activities per WMATA specifications. 	Compare average trip price with established goals	50%
Ensure cancellations are made appropriately	<ul style="list-style-type: none"> Ensure all cancellations are made at least 24 hours prior to appointment. Contact the Service Delivery contractor to communicate the cancellation. 	Trip data	50%

OTHER JOB FUNCTIONS:

- Adhere to established protocols.
- Demonstrate personal commitment to promptness, reliability, and quality work.
- Utilize correct coding and documentations procedures.
- Regular attendance is required.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Knowledge of, or ability to learn, Microsoft Outlook, Microsoft Word, Microsoft Excel, and Trapeze.
- Excellent written communication skills, with an emphasis on grammar and spelling.
- Ability to tactfully question and obtain information.
- Excellent organizational and interpersonal skills.
- Demonstrated ability to manage multiple priorities.
- Typing speed of 30 WPM or greater.
- Ability to handle confidential information in a professional manner.
- Superior problem solving skills.
- Extensive knowledge of MetroAccess protocols.

EDUCATION:

- High School Diploma or G.E.D. is required.

EXPERIENCE:

- Previous customer service experience is required.
- Previous data entry and/or experience in a call center preferred.

POSITIONS SUPERVISED:

None.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, printer, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pound and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print) _____

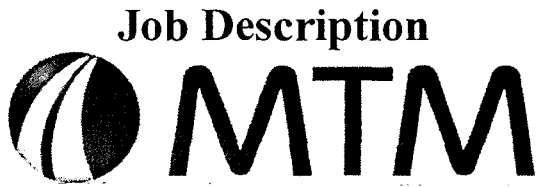
Supervisor Signature: _____

Title: _____

Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources
Cc: Employee's Supervisor
Employee



<p style="text-align: center;">Job Description</p>		Exempt	
		Non-exempt	X
		Full-time	X
		Part-time	
		Location	Washington, D.C.
		Origination Date	5/10/08
Job Title	QA Support Coach/OCC Monitor	Last Revision Date	12/10/12
Department	Quality Management		
Reports to	Administrative QA Manager	Page	1 OF 2

POSITION SUMMARY: The QA Support Coach/OCC Monitor maintains, promotes, and improves quality services in the OCC and monitors Customer Service Representative performance through call monitoring and evaluations. The QA Support Coach will conduct scheduled and random on-site monitoring of live and recorded calls.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Determine key performance indicators for OCC performance improvement	<ul style="list-style-type: none"> Work with the OCC contractor to update established protocols and procedures to improve quality. Conduct ongoing monitoring of Customer Service Representatives to review, document, and evaluate Operator Errors. 	Audit Tool Dashboard Daily Task List	25%
Monitors Customer Service Center Activities.	<ul style="list-style-type: none"> Monitor Representative phone skills by listening to recorded calls and scoring performance on the evaluation form. Monitor trip-specific skills by reviewing queried trips and recording Operator Errors on the evaluation form. Meet monthly goals for live call monitors and trip queries. Perform trip documentation reviews on each Representative. Review Operator Errors with Representatives. Handle confidential and sensitive issues. Report outcomes of quality monitoring. Demonstrate professional demeanor at all times. 	Audit Tool Dashboard Daily Task List	75%

OTHER JOB FUNCTIONS:

- Record results daily in the auditing spreadsheet.
- Provide timely feedback on a continual basis.
- Maintain a friendly and positive attitude.
- Track work day progress on tracking sheet.
- Other duties as assigned.
- Regular attendance required.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Extensive knowledge of Trapeze, Microsoft Word, Microsoft Excel, Microsoft Outlook, and telecommunications systems.
- Strong communication skills, both written and verbal.
- Extensive knowledge of MetroAccess protocols.
- Ability to take direction, but also to work independently.
- Ability to work with a diverse staff and management team.
- Ability to work with multiple situations and manage diverse issues.

- Ability to tactfully handle performance issues and provide suggestions for improvement.
- Ability to report quality measurements in meaningful and useful ways.

EDUCATION:

- High School Diploma or G.E.D. required.
- College degree preferred.

EXPERIENCE:

- A minimum of one year of Customer Service experience required.

POSITIONS SUPERVISED:

None.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, slide projector, and Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job requires sitting at a desk, talking on the phone, a high level of data entry, and viewing a computer screen for the majority of the day. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pounds and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print) _____

Supervisor Signature: _____


Title: _____

Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources
Cc: Employee's Supervisor
Employee



Job Description 		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	Washington, D.C.		
		Origination Date	7/1/08		
Job Title	Data Analyst	Last Revision Date	12/10/12		
Department	Quality Management				
Reports to	Administrative QA Manager	Page	1	OF	2

POSITION SUMMARY: The Data Analyst is responsible for the analysis, architecture, and specification of effective, efficient, and innovative business technology solutions and services. The Data Analyst provides project management services during development and production to ensure that business technology solutions and services are successfully adopted throughout the company to deliver the projected results. S/he also analyzes monthly data for potential process improvement.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Develop Business Solutions	<ul style="list-style-type: none"> Work with users to determine scope and requirements for new projects or working with business users on issues and opportunities on existing applications/processes. Gather and analyze business requirements and translate them into functional specifications and system design specifications. Develop timely and innovative solutions, with optimal use of technology and human resources. Create proper test plans and communicate with users during all phases of the test plan. Responsible for direct User Training or providing training material for trainers. Perform root cause analysis of issues. 	Client Sign Off and Commentary Sheet	80
Quality Project Management	<ul style="list-style-type: none"> Develop a complete and comprehensive project plan. Manage resources to deliver in accordance with the plan. Manage client expectations. 	Client Sign Off and Commentary Sheet	20

OTHER JOB FUNCTIONS:

- Support file based data processing in the production environment.
- Other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Analytical and problem solving skills.
- Ability to assimilate new and existing technologies, as well as third party products.
- Excellent verbal and written communication skills.
- Excellent interpersonal skills.
- Ability to be effective in a fast paced, dynamic environment.
- Excellent data mining skills.
- Ability to effectively interpret and analyze data.
- An in-depth understanding of Trapeze.
- Extensive knowledge of MetroAccess protocols.

EDUCATION:

- High School Diploma or G.E.D required.
- Bachelor’s degree (or equivalent combination of education and experience) in Information Technology, Computer science, or Business Administration preferred.

EXPERIENCE:

- Experience with computer based technology, beyond the use of standard spreadsheet, word processing, and other applications primarily designed for personal use in a non business environment.
- Experience applying technology to solve problems.
- Prior programming experience.
- Experience authoring software requirement specifications using industry best practices, tools, and methodologies.
- Experience authoring test plans and conducting testing using industry best practices, tools, and methodologies.
- Experienced in software development project management using industry best practices, tools, and methodologies across the full Software Development Life Cycle (SDLC).
- Experienced in implementing business process improvements, working with the end user to overcome resistance to change.

POSITIONS SUPERVISED:

None.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, printer, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pound and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print): _____

Supervisor Signature: _____

Title: _____


Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources
Cc: Employee’s Supervisor
Employee

Job Description



		Exempt			
		Non-exempt	X		
		Full-time	X		
		Part-time			
		Location	Washington, D.C.		
		Origination Date	2/13/08		
Job Title	Database Support Technician	Last Revision Date	12/10/12		
Department	Quality Management				
Reports to	Administrative QA Manager	Page	1	OF	2

POSITION SUMMARY: The Database Support Technician is responsible for data collection, tracking, entry, and reporting of contractor data, management of key data, and identifying fraudulent data patterns. S/he also supports all updates and revisions to the database.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Data Entry	<ul style="list-style-type: none"> Enter contractor data as required. Enter driver and vehicle liquidated damages and verify driver and vehicle information. 	Must meet a daily quota for data entry	70
Update database	<ul style="list-style-type: none"> Make any updates, changes, modifications, etc. to the database and its configuration. 	Timely updates	30

OTHER JOB FUNCTIONS:

- Use sound judgment in challenging unusual information.
- Regular attendance required.
- Other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Superior knowledge of Trapeze and ability to repair and troubleshoot all database and software issues.
- Strong ability and desire to learn and grow professionally.
- Strong ability to pay attention to detail.
- Strong customer service aptitude and skills.
- Excellent oral and written communication skills.
- Extensive knowledge of MetroAccess protocols.

EDUCATION:

- High School Diploma or G.E.D. required.

EXPERIENCE:

- Previous data entry experience preferred.
- Previous database support experience preferred.

POSITIONS SUPERVISED:

None.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, printer, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pound and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

____ without accommodations

____ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print): _____

Supervisor Signature: _____

Title: _____

Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources
Cc: Employee's Supervisor
Employee



<h2 style="text-align: center;">Job Description</h2>		Exempt	
		Non-exempt	X
		Full-time	X
		Part-time	
		Location	Washington, D.C.
		Origination Date	04/08/10
Job Title	IT Technician	Last Revision Date	12/10/2012
Department	Quality Management		
Reports to	Administrative QA Manager	Page	1 OF 2

POSITION SUMMARY: As a member of IT team working at our local Washington, D.C. office, the IT Technician will be responsible for documenting, maintaining, upgrading, and/or replacing hardware and software systems and also assisting with routine support requests.

PERFORMANCE MEASURES – MAJOR JOB OBJECTIVES

Major Job Objective	What's Expected	Measurement Criteria	%
Maintain, analyze, troubleshoot, and repair PC systems, hardware, and computer peripherals	<ul style="list-style-type: none"> Maintenance of all hardware and peripherals. 	The employee is satisfied with level of service.	10%
Document, upgrade, and/or replace hardware and software systems	<ul style="list-style-type: none"> Hardware changes must be documented in the hardware database. Other documents kept current. 	Database and other documents are kept up to date.	20%
Assist in administration of current and the dynamically growing future enterprise technology infrastructure	<ul style="list-style-type: none"> Assist other team members as needed. 	Co-worker feedback	20%
Assist in support of IT Services for all users	<ul style="list-style-type: none"> Assist other team members as needed. 	The MTM employee is satisfied with level of service.	30%
Work independently and without much direction	<ul style="list-style-type: none"> Complete tasks without supervision. 	The ability to work independently.	20%

OTHER JOB FUNCTIONS:

- Act as support for the Infrastructure Systems, client computers, and business equipment.
- Responsible for the day-to-day support of desktop hardware and software issues submitted via ticketing system.
- Manage the planning, installation, support, and maintenance of user computers (desktop, laptop), both hardware and software, and all peripherals.
- Manage hardware and software inventory of non-network equipment.
- Regular attendance is required.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Repair and troubleshooting experience with Windows Operating Systems (Windows XP, 2000, etc.), Microsoft, Trapeze, other business applications, and related hardware.
- Strong ability and desire to learn and grow professionally.
- Strong ability to pay attention to detail.
- Strong customer service aptitude and skills.
- IT Help Desk/service process and tools skills.
- Excellent oral and written communication skills.

EDUCATION:

- High school diploma or GED required.
- Comptia A+ certification or equal years experience preferred.
- Minimum of two years experience as a computer technician preferred.

EXPERIENCE:

- Must have experience with PC hardware, printers, software and peripherals.
- Must have a track record of exceeding set goals and expectations.
- Repair and troubleshooting experience with Windows Operating Systems and other business applications.

POSITIONS SUPERVISED:

None.

TOOLS/EQUIPMENT/MACHINES USED:

Computer, copy machine, fax machine, printer, Cisco phone system.

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions apply. Employee must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear, and operate computer keyboard. Job may require reaching at shoulder level and below waist. Will occasionally lift/push/pull up to 20 pound and carry objects 50 feet. Position may require both local and overnight travel.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations:

___ without accommodations

___ with the following accommodations:

Employee Name (print): _____

Employee Signature: _____

Date: _____

Supervisor Name (print): _____

Supervisor Signature: _____

Title: _____

Date: _____

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this job. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws. Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

Original: Human Resources
Cc: Employee's Supervisor
Employee

Attachment B



Statement of Intent to Contract

[Redacted]

and Medical Transportation Management, Inc. ("MTM"), 16 Hawk Ridge Drive, Lake St. Louis, MO 63367 enter into this Statement of Intent to Contract as a show of good faith and intention to proceed in a timely manner, with negotiations to reach agreement on a mutually acceptable subcontract for [Redacted] provide staffing services to MTM in the event that MTM is the successful awardee of the Paratransit Service - Quality Assurance contract in the District of Columbia, Maryland and Virginia service area. The contract for which MTM is submitting a bid, and for which this Statement of Intent to Contract is applicable, is the Washington Metropolitan Transit Authority (WMATA) Supply and Service Contract RFP CQ12169/KAM.

1) In the event Medical Transportation Management, Inc. is the successful awardee of the WMATA transportation services contract [Redacted] understand and agree in principle to provide staffing services to MTM. The parties are aware of the utilization on this contract and are in agreement.

2) The parties agree to the compensation to be paid by MTM to [Redacted] as set forth herein:

Year 1 Total Amount:	[Redacted]	Option Year 1 Total Amount:	[Redacted]
Year 2 Total Amount:	[Redacted]	Option Year 2 Total Amount:	[Redacted]
Year 3 Total Amount:	[Redacted]	Option Year 3 Total Amount:	[Redacted]
Year 4 Total Amount:	[Redacted]	Option Year 4 Total Amount:	[Redacted]
Year 5 Total Amount:	[Redacted]	Option Year 5 Total Amount:	[Redacted]

3) [Redacted] represents that it is certified as a Small Business and Local Preference Program ("SBLPP") business.

4) [Redacted] certifies that it does not discriminate in employment practices with regard to race, color, religion, age, sex, marital status, political affiliation, national origin, or physical or mental disability.

5) By signing this Statement of Intent to Contract [Redacted] not precluded from signing similar LOIs with other bidding parties. This is a non-binding Statement of Intent to Contract.

By: [Redacted]
Title: Dir of Bus. Development
Date: 12/10/12

Medical Transportation Management, Inc.
By: [Redacted]
Title: [Redacted]
Date: 12/10/2012

Attachment C

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY
SUPPLY AND SERVICE CONTRACT RFP CQ12169/KAM

7. BUY AMERICA ACT CERTIFICATION - NOT APPLICABLE

The Buy America requirements apply to federally assisted construction contracts, and acquisition of goods or rolling stock contracts valued at more than \$100,000.

- (a) By submission of this offer, the offeror certifies, and in the case of a joint offer, each party thereto certifies as to its own organization, that in connection with this procurement it will comply with 49 U.S.C. 5323(j) and 49 C.F.R. Part 661, which provide that Federal funds may not be obligated unless steel, iron, and manufactured products used in FTA-funded projects are produced in the United States, unless a waiver has been granted by FTA or the product is subject to a general waiver. General waivers are listed in 49 C.F.R. 661.7 Separate requirements for rolling stock are set out at 49 U.S.C. 5323(j)(2)(C) and 49 C.F.R. 661.11.
- (b) An offeror must submit to the Authority the appropriate Buy America certification (below) with all bids or offers on FTA-funded contracts, except those subject to a general waiver. Offers that are not accompanied by a completed Buy America certification must be rejected as nonresponsive. This requirement does not apply to lower tier subcontractors. Mark the applicable certifications below:

(1) **Certification requirement for procurement of steel, iron, or manufactured products:**

Certificate of Compliance with 49 U.S.C. 5323(j)(1)

The bidder or offeror hereby certifies that it will meet the requirements of 49 U.S.C. 5323(j)(1) and the applicable regulations in 49 CFR Part 661.5.

Certificate of Non-Compliance with 49 U.S.C. 5323(j)(1)

The bidder or offeror hereby certifies that it cannot comply with the requirements of 49 U.S.C. 5323(j)(1) and 49 C.F.R. 661.5, but it may qualify for an exception pursuant to 49 U.S.C. 5323(j)(2)(A), 5323(j)(2)(B), or 5323(j)(2)(D), and 49 C.F.R. 661.7.

(2) **Certification requirement for procurement of buses, other rolling stock and associated equipment:**

Certificate of Compliance with 49 U.S.C. 5323(j)(2)(C)

The bidder or offeror hereby certifies that it will comply with the requirements of 49 U.S.C. 5323(j)(2)(C) and the regulations at 49 C.F.R. Part 661.11.

Certificate of Non-Compliance with 49 U.S.C. 5323(j)(2)(C)

The bidder or offeror hereby certifies that it cannot comply with the requirements of 49 U.S.C. 5323(j)(2)(C) and 49 C.F.R. 661.11, but may qualify for an exception pursuant to 49 U.S.C. 5323(j)(2)(A), 5323(j)(2)(B), or 5323(j)(2)(D), and 49 C.F.R. 661.7.

SIGNATURE BLOCK FOR ALL REPRESENTATIONS AND CERTIFICATIONS

Name of Offeror: Medical Transportation Management, Inc.

Name and Title of Authorized Representative: _____

Print and Sign Name
President and CEO

December 10, 2012

Title

Date

1. Past Performance, Page 4

Please describe in detail how MTM's past experience has prepared it to successfully take on quality assurance tasks of the size and scope as those associated with MetroAccess, including the in-depth and highly analytical review of operational data of other independent contractors. Please describe the "lessons learned" in other contracts that will directly benefit WMATA. As a QA contractor, MTM will be responsible for developing a number of detailed reports specific to MetroAccess. Please provide sample operational data reports developed for other MTM clients. Provide detailed information including timeframes for reducing your overall complaint rate and increase in client satisfaction with your firm's services. Finally, please explain your 100% trip reconciliation process.

As demonstrated within our initial proposal, Medical Transportation Management, Inc. (MTM) has the ability to take on the Quality Assurance (QA) activities desired by the Washington Metropolitan Area Transportation Authority (WMATA) for its MetroAccess program due to our existing QA processes and procedures. Throughout our book of business, we maintain several large contracts similar in scope to WMATA's that will allow us to bring best QA practices to the MetroAccess program. While we understand that this program is larger and will require more intense scrutiny than our typical contracts, MTM is prepared to take our oversight and management techniques to a higher level to satisfy the requirements of WMATA and its RFP. Our broad and national experience, along with that of our affiliate Ride Right, a paratransit provider, will allow us to be the best contractor for WMATA's QA program.

In many of our current programs, including the three contracts described within our initial proposal, we must perform in-depth, highly analytic reviews of our third party subcontractors' operational data and transit services. Specifically, our network of more than 750 transportation providers nationwide requires comprehensive oversight activities to ensure successful operations; for example, we:

- Credential each provider's vehicles and drivers to ensure they meet our high standards
- Inspect each provider's vehicles initially and annually for ongoing compliance
- Audit vehicle, driver, and operational records for accuracy
- Review submitted claims for each performed trip prior to rendering payment, including 100% signature verification
- Manage provider compliance with the Federal Transit Administration (FTA) drug and alcohol program
- Utilize on-board cameras to record all activities and audit footage during incident or accident investigation

- Leverage StrataGen and mobile data terminals to dispatch vehicles, review routes, and address timeliness issues
- Develop Quality Tips of the Week addressing how to prevent issue trends experienced during the previous week

Preparing for This Contract

Within our amended Start Up/Transition Plan, provided as **Attachment A**, MTM has provided tasks and associated deadlines for the implementation of every aspect of this program. Perhaps most important to WMATA is our ability to understand its MetroAccess goals from day one. Our executive team, particularly President and CEO Alaina Maciá, is familiar with WMATA and some of its staff, and has a keen understanding of the District of Columbia transportation environment through our current local non-emergency transportation (NET) contract. This knowledge and understanding will transcend to our local management team, which will provide an auditing eye to this contract.

With the support of these individuals, our MetroAccess-dedicated employees will bring a strict, compliance-focused approach to this program with the overarching goal of improving paratransit service. All of our local staff members will undergo a variety of training activities, including training on ethics and compliance, to ensure we have a fully informed team of employees ready to service WMATA and its paratransit customers from day one of this contract.

Lessons Learned from Other Contracts

With our extensive QA experience, MTM is able to utilize best practices to meet the goals of this contract. For example, in our NET contract with the District of Columbia Department of Healthcare Finance (DHCF), MTM has vastly improved program performance through QA activities. Prior to our management, the NET program suffered from a non-compliant transportation provider network as identified through numerous Office of Inspector General (OIG) audits. Additionally, the program was without adequate record maintenance and accountability measures, lacked important data collection, and did not verify services prior to payment. Combined, these deficiencies caused the program to be unsafe, inefficient, and costly.

Since beginning our operations in October 2007, MTM has corrected and improved all of the concerns identified in the audit. Specifically, MTM brought the network of transportation providers into compliance through our screening and credentialing processes. To eliminate fraud and abuse, we now reconcile 100% of the trips prior to payment, and added an additional layer of payment verification by processing daily attendance reports for all recurring transportation appointments. The District's program is now well-documented, with historical data collected and reported monthly to provide DHCF with clear, concise, and easy access to program activities, which helps determine program successes and introduce specific QA measures. We utilize on-board cameras to identify retraining opportunities and reduce the number of reported incidents and complaints. Similar activities based on our District success have since been introduced to various other clients, allowing us to achieve similar QA functions throughout many of our contracts. We will leverage this success in our MetroAccess QA operations to achieve an impartial and highly coordinated approach to paratransit management with WMATA's Service Delivery and Operations Control Center (OCC) contractors.

In addition to our DHCF NET contract, MTM uses similar results from other large clients to promote company-wide success. Under our contract with the Texas Health and Human Services Commission (HHSC) for NET services in Houston, MTM has taken great strides to improve overall service quality by addressing complaints in a timely, effective fashion. Since beginning the program in March of this year, MTM has greatly reduced complaints from stakeholders. To achieve this, we looked at complaints from all angles and developed appropriate corrective actions to prevent future occurrences. For example, one step we took in Houston was to identify service issues by transportation provider and develop customized, focused recommended training for drivers. During the first six months of this program, our efforts reduced complaints from 668 complaints for 92,780 trip legs (ratio of 0.72 percent) in March to a mere 278 complaints for 65,220 (ratio of 0.43 percent) in September, below the NET industry-accepted standard of one percent.

Sample Reporting Package

In **Attachment B**, MTM has included a sample reporting package for WMATA's review. This is the standard monthly reporting suite that we provide to our NET clients, and demonstrates our ability to collect and trend programmatic data.

Reducing Overall Complaint Rates

Through our 17 years of experience implementing new programs of various sizes and scopes, MTM has achieved success in reducing overall complaint rates and increasing client satisfaction with our services as compared to previous contractors'. However, during the initial transition period there is often a timeframe during which an abnormal spike in complaints occurs. This is typical of any significant service transition. In our experience, we have found all unusual complaint activity to be normalized within a 90 day timeframe. After this period, client satisfaction is vastly improved with higher satisfaction rates and lower complaint rates.

Our QA staff works tirelessly to achieve these results by performing dedicated quality management activities on a daily basis. For example, these staff members monitor and trend complaints by transportation provider and by medical facility, working with our internal staff, providers, and facilities to respond to and rectify all issues immediately. This is a very effective process that results in optimal client and customer satisfaction quickly, as demonstrated above for the first six months of our Houston program.

100% Trip Reconciliation Process

To ensure our subcontracted transportation providers are only reimbursed for services actually rendered, MTM conducts a 100% trip reconciliation process in our NET contracts using both automated and manual processes. While not directly applicable to the MetroAccess QA contract, this process demonstrates our ability to review claims data for accuracy. Transportation providers submit billing information and review payment details electronically via our secure online system. Within this process, in order for reimbursement to be authorized, each claimed trip must match a completed trip and must be assigned to the transportation provider of record. Additionally, the cost of the trip must match the cost that was agreed upon during scheduling. If the cost is based on mileage, the mileage must match the mileage provided by our system, which utilizes GIS software to make all mileage determinations. Our process also includes validating that the driver and vehicle used to perform the trip are fully credentialed and in good standing. During the claims process, all providers must submit to MTM four times for each trip leg, including:

- Scheduled pick-up time
- Actual time the vehicle arrived at the pick-up location
- Time the vehicle left the pick-up location
- Time the vehicle arrived at the destination

Our system compares scheduled times to those stored within our system, and also compares scheduled to actual times for any anomalies. In addition, we compare the passenger's signature collected by the transportation provider at pick-up and drop-off to the signature we have on file for the passenger. By confirming accurate qualifying signatures, we ensure that the passenger actually utilized NET services on the day claimed by the transportation provider.

In the event that the Trip Reconciliation department detects inappropriate billing, we investigate for potential fraud. We may flag the transportation provider as a potential fraud and abuse offender. If a transportation provider is marked as such, our Trip Reconciliation team conducts close examination of all future claims from the provider to ensure billing errors do not occur again. If a transportation provider continually submits error-ridden reconciliation data and intentional fraud and abuse is verified, the provider may be subject to liquidated damages, performance improvement plans, or termination from our network. Overall, this process reduces payment for actual trips rendered by approximately 8% over those claimed.

2. Past Performance, Page 4

What is MTM's historical employee turnover rate by contract, by year and by staff position for all similar contracts?

The only turnover information that MTM tracks by office location is for call center employees, which we feel is not relevant to this contract. Alternatively, in the below **Figure 1**, we have provided dates of employment for key management positions in our Houston, District of Columbia, and Minnesota operations.

Job Title	Name	Date of Hire	Location
Area Liaison	[REDACTED]	11/1/2004	St. Paul, Minnesota
Supervisor, Care and Utilization Management	[REDACTED]	2/16/2005	St. Paul, Minnesota
Program Director	[REDACTED]	8/22/2007	St. Paul, Minnesota
Manager, Customer Service Center	[REDACTED]	11/28/2011	St. Paul, Minnesota
Supervisor, Customer Service Center	[REDACTED]	7/27/2009	Washington, D.C.
Director, Travel Training	[REDACTED]	8/23/2010	Washington, D.C.
Operations Manager	[REDACTED]	5/21/2012	Washington, D.C.
Manager, Transportation Dispatch	[REDACTED]	8/8/2012	Washington, D.C.
Care Management Coordinator	[REDACTED]	10/22/2007	Washington, D.C.

Job Title	Name	Date of Hire	Location
Network Compliance Manager	[REDACTED]	3/10/2008	Washington, D.C.
Program Director	[REDACTED]	9/10/2007	Washington, D.C.
Network Management Representative	[REDACTED]	3/12/2012	Houston, Texas
Education, Training, and Outreach Coordinator	[REDACTED]	12/12/2011	Houston, Texas
Field Monitor	[REDACTED]	2/6/2012	Houston, Texas
Manager, Customer Service Center	[REDACTED]	9/17/2012	Houston, Texas
Program Director	[REDACTED]	11/9/2009	Houston, Texas

Figure 1: Management Tenure. This figure shows MTM's low turnover for key management staff.

3. Page 19

MTM has indicated that they wish to propose a new customer No Show suspension penalty process. Please explain how this will provide greater benefit to MetroAccess than the current suspension process as described in the RFP.

As mentioned within our original proposal, MTM has introduced an improved no show education and suspension process to many of our contracts that has successfully limited no show and late cancellation occurrences. This process begins by sending a series of three education letters informing the customer that his/her continual no show and/or late cancellation behavior is a serious matter and may result in a suspension of MetroAccess service. Then, if the educational letters are not effective, a 30 day suspension will be imposed if approved by WMATA.

By outlining this process within our proposal, MTM demonstrated our ability to effectively limit the number of no shows that routinely occur in paratransit programs like MetroAccess'. In our typical NET programs, this has proven to be a very effective policy that increases customer continuity of care, ensures proper utilization of services, and makes the most use of program funding. Upon contract award, we will abide by WMATA's current points system and policy of a warning letter followed by subsequent one-week, two-week, and four-week service suspensions.

4. Page 20

MTM has indicated that QA Representatives may impose corrective action on customers or contractors. Please describe how MTM would determine their appropriate application and how such corrective actions would be levied. Also, please elaborate on whether this process is intended to complement the performance incentives and/or liquidated damages stated in the RFP or replace them. If the intent is to replace the stated performance incentives and/or liquidated damages, please elaborate on why you consider the proposed corrective actions more likely to achieve better performance by the OCC and Service Delivery contractors.

MTM does not typically impose corrective actions on customers; the comment regarding corrective actions applies only to WMATA's OCC and Service Delivery contractors. As appropriate based on the complaint resolution, our QA Representative will determine the action to be taken. These actions will tie back into WMATA's requirements as delineated within the RFP; specifically, we will suggest liquidated damages be collected from the offending contractor. This is meant only to complement WMATA's performance incentives and damages.

5. Page 21

MTM states that QA Representatives will offer "reliable and reasonable assistance at all times". Does MTM propose to have complaint management staff available 24/7? If so, please describe staffing levels in detail.

MTM does not propose to have QA Representatives available to resolve complaints on a 24/7 basis. This statement was simply meant to say that when communicating with customers and MetroAccess contractors, our QA Representatives will always provide reliable and reasonable assistance. When customers call after regular business hours, they will be able to leave a voicemail stating their issue and contact information, and a QA Representative will return the call the following business day.

6. N/A

Please describe, in detail, MTM's proposed incident management and review processes and procedures. Incident is defined as including, but not limited to, collisions, injuries, altercations, illness requiring EMS transport, and any events the FTA defines as being NTD reportable.

To ensure all incidents are resolved appropriately, MTM has a thorough investigation and reporting process in place. In compliance with WMATA, MTM defines an incident as a collision, injury, altercation, illness requiring EMS transport, and any other NTD-reportable event. It is our understanding that, as the QA contractor, MTM will be responsible for investigating incidents, but

the OCC contractor will be responsible for reporting the incident to both MTM and WMATA within 15 minutes of receipt from the Service Delivery contractor. Upon receipt, an MTM Safety and Street Supervisor will immediately be dispatched to the scene to initiate a thorough investigation of the incident. Coordinating communication between the Service Delivery personnel, the customer, and any emergency or law enforcement agent present will allow the Supervisor to obtain a detailed account of the situation to determine any fault and potential action to be taken.

Utilizing this information, the Supervisor will develop a detailed report that will include, but not be limited to, the name of the driver and customer(s) involved; address, date, and time of incident; whether illness or injury was involved; description of the incident; and final disposition and resolution. The written report will be provided to WMATA within 24 hours of the incident. Please see **Attachment C** for our current incident policy; upon contract award, this will be customized to fit our WMATA operations.

7. Page 24 & Page 50

What methods/techniques/statistical analyses will be used to review, evaluate, and report on performance data, including reconciliation process review with respect to WMATA performance standards resulting in incentives and/or liquidated damages being paid or assessed? Please clarify the sampling methodology you would use to ensure the validity of the data.

To ensure all performance data and reconciliation claims are evaluated appropriately, MTM will utilize Trapeze, COGNOS, and other WMATA-required reporting tools to review this information. Additionally, Transit Miner will allow us to perform a simpler and more in-depth method of key performance indicator analysis. Transit Miner will give MTM insight into the most minute MetroAccess performance details and exceptions, and allow us to drill into the circumstances of such exceptions. For example, if a driver or route consistently runs late, this information would be readily apparent within Transit Miner's on-time performance graph suite, allowing us to determine if there was a scheduling problem, if driver re-training is necessary, or if liquidated damages need to be assessed for continual contractor issues. For more information on the details regarding our contractor invoice review process, refer to Question 25. Additionally, as mentioned in Question 1, in our typical NET programs we verify 100% of trips conducted by our transportation providers. We will explore opportunities for bringing some aspects of this process to our WMATA QA operations; for example, we may verify and compare 100% of paper manifests to MDT and Trapeze data. Then, we will perform spot check verifications on a random five percent of invoices to ensure they have been reconciled correctly and accurately.

8. Page 24 & Page 50

Considering the massive amount of data captured by Trapeze and by field monitoring, which operational data will be reviewed and how? What data points will be examined and how? How will appropriate sample sizes be determined? What frequency does MTM propose on which the reviews will be performed? What staff position(s) will be assigned to each review?

While Trapeze captures a massive amount of data on daily basis, MTM's proposed use of Transit Miner will allow us to review specific, important data points. As its name implies, Transit Miner was built to "mine" through large quantities of data to find the hidden details. Our MetroAccess-dedicated Data Analysts will be responsible for all data reviews, and will review all data sources on a daily basis. Appropriate sample sizes will be determined based on our staffing levels and the number of trips/calls taken by the Service Delivery and OCC contractors, focusing on the highest areas of performance impact.

Some important examples of data points that we will review in our QA operations include:

1. Productivity: This will help us identify issues with subscription trip templates and schedule optimization, which will highlight when Trapeze parameter settings need to be adjusted and/or when it is time to do a run-cut and rebid.
2. On-Time Performance: This data point will help us identify drivers that are habitually late. With this information, we can suggest re-training on proper loading procedures or becoming more familiar with parts of the service delivery area. Further, on-time performance data will allow us to identify routes that repeatedly run late; this could be an indication of poor scheduling, inaccurate geocoding, or improper route level settings.
3. Cost: Based on this data, we can recognize areas of excessive use of hours. For example, this could occur during morning pull outs, before and after lunch breaks, and when returning to the yard.
4. Complaints: MTM will monitor excessive complaint data for specific routes, drivers, customers, and locations to ensure appropriate resolution and potential program improvement opportunities.

9. Page 28

MTM proposes the same total number of staff as was noted in the RFP as currently performing QA functions along with other duties outside the QA function. Please detail the benefit to WMATA of the proposed QA staffing plan. Please include the skill sets you feel are needed to perform the various Quality Assurance positions proposed. How will your firm ensure the competency of staff during the entire contract period? Please provide additional detail concerning executive oversight of the project team.

During the proposal response process, MTM decided to propose the same number of staff as WMATA currently employs because we believe this is adequate for all activities as laid out within the RFP and our proposal. We utilized our specific and proven staffing projection process to determine the appropriate employee counts. Specifically, we compared the projected number of trip legs for this program and compared it to that of similar clients. We then determined the approximate number of complaints and monitoring activities to reach an appropriate staffing level. This process has proven to be accurate in other contracts based on a similar QA model; however, we will modify our staffing levels upon WMATA's request.

In the following **Figure 2**, we have outlined the skill sets that we feel our staff should possess.

Staff Skill Sets	
Positions	Required Skills
General Manager	<ul style="list-style-type: none">• Ability to be responsive to WMATA and achieve all deliverables in a timely manner• Expert knowledge of MetroAccess program requirements• Excellent oral and written communication skills• Superior management capabilities• Intricate customer service skills• Superior problem solving skills• Ability to conduct financial analysis and forecasting• Proficiency with Microsoft Outlook, Microsoft Word, Microsoft Excel, Trapeze, SQL query writing, Crystal Reports, and other standard software applications• Ability to prepare and present comprehensive reports and briefings• Ability to multi-task, prioritize work, and collaborate effectively under pressure

Staff Skill Sets

	<ul style="list-style-type: none"> • Ability to observe, document, and evaluate paratransit operations • Ability to identify service issues and develop effective solutions to resolve these issues
<p>Administrative QA Manager</p>	<ul style="list-style-type: none"> • Ability to effectively interpret and analyze data • Ability to prepare and present comprehensive reports and briefings • Success in completing difficult assignments • Proficiency in the review, coordination, and monitoring of contractor invoicing and payment • Ability to conduct financial analysis and forecasting • Proficiency with Microsoft Outlook, Microsoft Word, Microsoft Excel, Trapeze, SQL query writing, Crystal Reports, and other standard software applications • Expert knowledge of MetroAccess program requirements • Ability to multi-task, prioritize work, and collaborate effectively under pressure
<p>Operations QA Manager</p>	<ul style="list-style-type: none"> • Ability to observe, document, and evaluate paratransit operations • Ability to identify service issues and develop effective solutions to resolve these issues • Ability to effectively interpret and analyze data • Ability to prepare and present comprehensive reports and briefings • Knowledge, understanding, and sensitivity of individuals with disabilities, including mobility-related issues • Proficiency with Microsoft Outlook, Microsoft Word, Microsoft Excel, Trapeze, SQL query writing, Crystal Reports, and other standard software applications • Expert knowledge of MetroAccess program requirements • Ability to multi-task, prioritize work, and collaborate effectively under pressure
<p>QA Representative</p>	<ul style="list-style-type: none"> • Typing speed of 30 WPM or greater • Knowledge of, or ability to learn, Microsoft Outlook, Microsoft Word, Microsoft Excel, and Trapeze • Exemplary communication and phone skills • Ability to relate to a diversity of customers and requests • Ability to identify with customer needs and circumstances • Extensive knowledge of MetroAccess protocols

Staff Skill Sets

<p>QA Coordinator</p>	<ul style="list-style-type: none"> • Knowledge of, or ability to learn, Microsoft Outlook, Microsoft Word, Microsoft Excel, and Trapeze • Excellent written communication skills, with an emphasis on grammar and spelling • Ability to tactfully question and obtain information • Excellent organizational and interpersonal skills • Demonstrated ability to manage multiple priorities • Typing speed of 30 WPM or greater • Ability to handle confidential information in a professional manner • Superior problem solving skills • Extensive knowledge of MetroAccess protocols
<p>No Show Monitor</p>	<ul style="list-style-type: none"> • Knowledge of, or ability to learn, Microsoft Outlook, Microsoft Word, Microsoft Excel, and Trapeze • Excellent written communication skills, with an emphasis on grammar and spelling • Ability to tactfully question and obtain information • Excellent organizational and interpersonal skills • Demonstrated ability to manage multiple priorities • Typing speed of 30 WPM or greater • Ability to handle confidential information in a professional manner • Superior problem solving skills • Extensive knowledge of MetroAccess protocols
<p>Facility and Maintenance Monitor</p>	<ul style="list-style-type: none"> • Strong interpersonal skills • Ability to work independently with minimal supervision • Self-motivation and superior time management skills • Knowledge of, or ability to learn, Microsoft Outlook, Microsoft Word, Microsoft Excel, and Trapeze • Proven experience dealing with conflict management • Knowledge of appropriate maintenance processes • Willingness and ability to travel locally within the District of Columbia 75+% of the time • Valid/current driver's license and a clean driving record • Flexibility to work a variety of work schedules/hours • Extensive knowledge of MetroAccess protocols

Staff Skill Sets

Safety and Street Supervisor	<ul style="list-style-type: none"> • Strong interpersonal skills • Basic knowledge of the District of Columbia, along with ability to read and follow maps • Ability to work independently with minimal supervision • Self-motivation and superior time management skills • Knowledge of, or ability to learn, Microsoft Outlook, Microsoft Word, Microsoft Excel, and Trapeze • Proven experience dealing with conflict management • Willingness and ability to travel locally within the District of Columbia 75+% of the time • Valid/current driver's license and a clean driving record • Flexibility to work a variety of work schedules/hours • Extensive knowledge of MetroAccess protocols
Data Analyst	<ul style="list-style-type: none"> • Analytical and problem solving skills • Ability to assimilate new and existing technologies, as well as third party products • Verbal and written communication skills • Excellent interpersonal skills • Ability to be effective in a fast paced, dynamic environment • Excellent data mining skills • Ability to effectively interpret and analyze data • An in-depth understanding of Trapeze • Extensive knowledge of MetroAccess protocols
Billing Auditor	<ul style="list-style-type: none"> • Extensive knowledge of Trapeze, Microsoft Outlook, Microsoft Word, and Microsoft Excel • Exemplary verbal and written communication skills • Excellent organizational and multi-tasking skills • Ability to tactfully question and obtain necessary information from OCC and Service Delivery contractors • Ability to handle confidential information in a professional manner • Ability to make solid judgment calls required • Extensive knowledge of MetroAccess protocols

Staff Skill Sets	
Compliance Auditor	<ul style="list-style-type: none"> • Proficiency with Microsoft Word, Microsoft Excel, Microsoft Outlook, and Trapeze • Excellent written communication and problem-solving skills • Excellent organizational, interpersonal, and teamwork skills • Ability to multi-task in a fast-paced environment • Ability to handle confidential information in a professional manner • Ability to make solid judgment calls • Knowledge of all departmental and contractual responsibilities • Extensive knowledge of MetroAccess protocols
IT Technician	<ul style="list-style-type: none"> • Repair and troubleshooting experience with Windows Operating Systems (Windows XP, 2000, etc.), Microsoft, Trapeze, other business applications, and related hardware • Strong ability and desire to learn and grow professionally • Strong ability to pay attention to detail • Strong customer service aptitude and skills • IT Help Desk/service process and tools skills • Excellent oral and written communication skills
Database Support Technician	<ul style="list-style-type: none"> • Superior knowledge of Trapeze and ability to repair and troubleshoot all database and software issues • Strong ability and desire to learn and grow professionally • Strong ability to pay attention to detail • Strong customer service aptitude and skills • Excellent oral and written communication skills • Extensive knowledge of MetroAccess protocols
QA Support Coach/OCC Monitor	<ul style="list-style-type: none"> • Extensive knowledge of Trapeze, Microsoft Word, Microsoft Excel, Microsoft Outlook, and telecommunications systems • Strong communication skills, both written and verbal • Extensive knowledge of MetroAccess protocols • Ability to take direction, but also to work independently • Ability to work with a diverse staff and management team • Ability to work with multiple situations and manage diverse issues • Ability to tactfully handle performance issues and provide suggestions for improvement • Ability to report quality measurements in meaningful and useful ways

Figure 2: Staff Skills. MTM ensures WMATA that we will employ successful staff members by requiring each to meet the qualifications shown within this chart.

Ensuring Staff Competency

In addition to monitoring the activities of our OCC and Service Delivery contractors, MTM has various methods in place to monitor the performance of our own staff. For example, all staff members undergo an annual review. During this review, the employee's supervisor retrospectively evaluates the employee's performance throughout the past year. This allows us to identify staff strengths and weaknesses, and recommend re-training as necessary. We will also conduct weekly staff meetings and monthly one-on-one reviews to address any issues and goals.

Additionally, all staff are required to complete a two-week training period at the beginning of their employment with MTM, and we conduct annual refresher training as part of the evaluation process. Training certificates are kept in the employee's file throughout their employment. Based on poor performance, employees may be required to complete further re-training activities. We will also allow our staff to continually pursue additional training opportunities that lend value to the management of this contract.

Executive Oversight

To ensure our MetroAccess-dedicated employees have a reliable support system, MTM's executive leadership maintains an open door, collaborative relationship with our local operational teams. Our corporate leadership is extremely knowledgeable in the field of transportation with varying backgrounds to fully inform our approach. These backgrounds are relevant to this contract, including transportation logistics and operations, ADA paratransit, quality management, and financial management. Throughout the life of this contract, they will be available to support our local management through any issues they may have. In particular, our President and CEO Alaina Maciá will be intimately involved throughout implementation and beyond. She will be on-site on a weekly basis to ensure all activities are executed satisfactorily, and will further oversee the 90-day post go-live timeframe. Other executives will also be on-site periodically to review our WMATA activities; this is a level of dedication that other large management firms are unable to provide.

Additionally, MTM has former WMATA employees on staff, and will leverage their expertise of MetroAccess operations to achieve optimal QA success.

10. Page 43

Who will maintain MTM's fleet? What are their qualifications?

While MTM has not yet chosen a specific dealership from which we will purchase our fleet vehicles, we do intend to use this dealership for all fleet maintenance. As stated in our proposal, we plan to purchase eight Toyota Priuses for our QA activities. Once awarded this contract, we will choose a District of Columbia-based Toyota dealership from which to purchase these vehicles. Dealerships use qualified mechanics and will maintain our fleet to all manufacturer standards; when our decision is made, we will provide WMATA with a list of mechanic qualifications.

11. Page 45

WMATA has at times been unsatisfied with Spider due to the tool's performance and the responsiveness of its developer. Please explain how WMATA will not encounter the same difficulties with Transit Miner. Also, please describe how Transit Miner will be integrated with the applications identified in Part III, Section 5.4 of the RFP, and will provide better data access and reporting capabilities than Spider. Compare and contrast as necessary with Spider software. In addition, please describe how the Transit Miner data will be reconciled with data reported by the OCC and Service Delivery contractors.

Per our conversations with Transit Miner's developer, Spider was never designed to be flexible or handle a program as large as WMATA's. In fact, it is our understanding that it was retro-fitted to meet WMATA's custom reporting requirements. For example, Spider's underlying technology, FoxPro, has a maximum database capacity of 2GB which is equivalent to about two to three months worth of WMATA's operational data. Considering the size and scope of services that WMATA provides, this is not nearly enough space. Additionally, the software's architecture does not allow for flexibility without major code changes.

MTM is confident that Transit Miner will be a better fit to supplement COGNOS. This system was designed with large data sets and great flexibility in mind. It has a 64 terabyte storage limit, which equates to roughly 150 years of WMATA data. Data will always be available online and will be accessible without archiving. [REDACTED], who developed Spider in 1999, freely acknowledges that the level of support and responsiveness for its clients was unacceptable after 2005. The continued degradation of the system, as well as lack of internal support for upgrades and resources, was a major factor in his decision to break away from MV Transportation in 2011. He now leads a team that will dedicate 100% of their time, resources, and attention to client needs, providing the absolute best set of tools available for the paratransit industry.

Integrating Transit Miner with WMATA's Applications

As outlined within the RFP, WMATA expects that the QA contractor will integrate its software with its Trapeze system. We understand that COGNOS will be the definitive source for real-time and historical reporting activities. Within this architecture, Transit Miner's role will be to supplement Trapeze/COGNOS reporting and key performance indicators by providing additional information on important operational aspects. For example, COGNOS provides some real-time on-time performance tracking but not as in-depth as Transit Miner. While COGNOS only indicates what on-time performance is at any given time, Transit Miner was built by an individual with operational experience and helps identify root causes of operational deficiencies. In short, COGNOS only indicates the *what* behind performance, while Transit Miner will show MTM the *why*, giving MTM and WMATA better data access and reporting capabilities. By integrating Transit Miner with Trapeze, MTM will also be able to reconcile the data reported by Transit Miner with that reported by the OCC and Service Delivery contractors. In the following **Figure 3**, MTM has outlined the differences between Transit Miner and Spider.

Transit Miner vs. Spider	
Transit Miner	Spider
All report data is stored and retrievable at any time, providing month-to-month and year-to-year comparisons for key performance indicators	Due to size limitations, archives must be performed monthly, making month-to-month and year-to-year comparisons a time consuming process from browser to Excel
Has been tuned and optimized for maximum performance on large data sets, allowing data to be imported within seconds	Is not optimized for large data sets, requires six to eight hours to import and refresh new information from WMATA, and is prone to program errors that sometimes require multiple imports and result in outages
Provides near instant retrieval of reports spanning multiple years and provides custom search filters and date ranges, granting the user flexibility in identifying service trends to make more informed decisions	Is not capable of receiving user input, has a rigid set of canned reports that are difficult to manipulate, and requires import into third party software for analysis
Provides information in a variety of formats, including classic tabular or grid style, interactive charts, and dashboards that can be customized to fit the needs of various user roles	Provides almost exclusively non-graphical information, is not interactive, and cannot be custom tailored for individual users or groups

Transit Miner vs. Spider	
Is a secure system built using the same standards of online banking systems including all aspects of data load, storage, and presentation	Provides very little security
Sits on a robust yet simple user-administration module that allows access to specific modules, reports, and data sets based on security level and role within the organization; new users can be added and assigned to roles independently and without having to contact the vendor for support	Provides no user-administration, no role-based report access, and no limitation on data access; all users must be set up and maintained by the vendor

Figure 3: Transit Miner vs. Spider. Transit Miner will offer WMATA a more in-depth data mining and reporting experience than Spider.

12. Page 46

WMATA requires extensive documentation and document retention. Please provide further detail for how the scanning of hard copy documents will be accomplished. Please describe your proposed filing system, and describe the method by which WMATA staff might recall specific documentation when needed.

To accomplish hard copy document scanning and electronic retention, MTM utilizes a software system known as FileBound that allows us to store files as an image within a repository. Using a scanning system, FileBound captures data such as document names, customer names, etc., auto-naming the document and storing it within the correct file. FileBound hosts all documents in a web-based environment. Utilizing security-based roles, WMATA will have the ability to access all documents without having to remotely connect to our system. WMATA will have its own log-in information to the secure site, and will be able to search for documents by file name, customer name, contractor name, and a variety of other data points.

13. Attachment D

It appears as though MTM has not scheduled its transition-in to be complete until September 2, 2013. Please explain how MTM will provide all required QA services no later than the contract start date of July 1, 2013. Please provide a detailed explanation of the differences expected in the QA role as opposed to your previous operations start-ups.

In **Attachment A**, MTM has provided an amended start up/transition plan. Within this plan, we detail how we will position ourselves to provide all QA activities by the expected start date of July 1, 2013.

Implementation Differences

While other potential QA contractors may have specific differences between the implementation of this program versus their typical operational start ups, with MTM, many implementation activities will be identical. In fact, our standard NET start ups involve far more detailed and intricate transition activities than we anticipate from WMATA's MetroAccess QA program. Because MTM has a stand-alone, dedicated QA department, we are able to ensure that quality and auditing responsibilities play an important role in all of our contracts. Our standard implementation activities ensure quality is present during the entire transition process, and account for a variety of specific QA measures.

One specific difference between this implementation and our typical implementations is the involvement of additional contractors. Most of our implementations involve coordinating with our internal call center operations and Network Management activities, while this contract will require us to work with external OCC and Service Delivery contractors. However, we are highly skilled in coordinating implementation activities with outside entities such as transportation providers, and will be able to achieve this seamlessly for WMATA.

The provided start up/transition plan accounts for all of these activities. With MTM's implementation expertise, WMATA is ensured that its QA program will be implemented smoothly with all around stakeholder satisfaction.

14. Attachment A

Please describe how this hardcopy form is translated into reportable, electronic data.

As a company dedicated to constantly creating innovative solutions for all aspects of our business, MTM is pleased to offer WMATA real-time data and reporting capabilities through our mobile notepad technology capabilities. The form included within our original proposal is an electronic document that will be accessed via a tablet computer, smart phone, or similar handheld device. Using the handheld device, our OCC Monitors will conduct in-person monitoring activities utilizing the referenced evaluation form. Each field within the form will be evaluated impartially to provide an accurate account of the call monitoring experience. Then, as the form is completed by the OCC Monitor, all data contained within will be automatically aggregated and transferred into Transit Miner, allowing real-time and reportable electronic performance data. WMATA will also have real-time access to this information for up-to-the-minute results.

15. Attachment B

Please describe how this hardcopy form is translated into reportable, electronic data.

Much like we plan to utilize mobile notepad technology to conduct OCC call monitoring activities, we intend to use the same methodology for in-person vehicle and facility inspections and field monitoring. Our Facility and Maintenance Monitors, as well as our Safety and Street Supervisors, will utilize their handheld devices to fill in the referenced on-site inspection form. Following completion, the data will be immediately transmitted to Transit Miner for real-time electronic reporting capabilities. WMATA will have access to this data at all times.

16. Attachment C, [REDACTED]

Please describe how this candidate meets the requirements set forth for the General Manager position in the RFP.

MTM's proposed General Manager [REDACTED] is a transportation professional dedicated to the continual provision of high quality transit service. With 14 years of experience in the transit industry, he has had oversight of each aspect of service required by this contract: quality assurance, customer service and call center operations, paratransit management, Trapeze operations, and more. As shown in the revised resume provided in **Attachment D**, [REDACTED] meets all WMATA requirements; specifically, he has:

- **Five Years Management Experience on Contracts of a Highly Technical Nature:** [REDACTED] has been involved in management, supervisory, and technical roles related to transportation since 1999. This includes contracts similar to and including the MetroAccess program, such as his roles as Operations Manager for New Jersey Transit's Access Link paratransit program from 2009 to present; Special Projects Manager for New York City Transit's Access-A-Ride paratransit program in 2009; General Manager for New Jersey Transit's Access Link paratransit program from 2008 to 2009; General Manager for the District of Columbia's Medicaid transportation program from 2007 to 2008; Assistant Call Center Manager for WMATA's MetroAccess program from 2005 to 2007; Dispatch Supervisor for WMATA's MetroAccess program from 2002 to 2005; and Assistant Operations/Dispatch Manager for a District of Columbia Medicaid transportation provider from 1999 to 2002.

- **A Bachelor's Degree, or Five Years Additional Public Transit Experience:** While [REDACTED] does not have a bachelor's degree, he has studied toward his degree in business management at an accredited institution. He has more than 14 years of paratransit and public transit experience, exceeding WMATA's degree substitution requirement.
- **A High Level of Customer Service Commitment:** In each of the roles mentioned above, [REDACTED] has demonstrated his dedication to providing customers with the highest quality service experience possible. All of these positions required him to communicate with customers and clients on a daily basis, responding to and resolving all issues in a timely and satisfactory manner. This includes his experience working within MetroAccess' own call center for nearly three years.

17. Attachment C, [REDACTED]

Please describe how this candidate meets the requirements for the Quality Assurance Manager position set forth in the RFP. Please provide additional detail regarding the analytical skills of this candidate.

[REDACTED], our proposed Administrative Quality Assurance Manager, is a highly regarded and capable paratransit manager with valuable operational and financial audit expertise, including experience specific to public transportation. Not only does [REDACTED] possess the skills to fulfill this role, she has a professionally respected management and interaction style with others at all levels of varying organizational types. Specifically, MTM firmly believes [REDACTED] meets all WMATA requirements, including:

- **Five Years Experience with Large, Urban ADA Paratransit Services and Seven Years Total Public Transportation Experience:** By the time this contract goes live, [REDACTED] will have 12 years total experience in public transit administration, exceeding this requirement. The majority of [REDACTED] professional transportation experience is in ADA paratransit; specifically, this includes her combined nearly eight years as a General Manager in Carteret County and Anne Arundel County. [REDACTED] also spent two years as a medical transportation coordinator in Carteret County, and two years as an Internal Auditor for First Transit.
- **A Bachelor's Degree, or Five Years Additional Public Transit Experience:** [REDACTED] does not possess a degree; however, her 12 total years of public transportation experience described above includes the base seven years plus an additional five, meeting WMATA's degree substitution requirement.

- **A Working Knowledge of Trapeze PASS or Other Event-Based Paratransit Applications:**
While [REDACTED] does not specifically have experience with Trapeze PASS, she has plentiful experience with other ADA paratransit scheduling and dispatch software suites, including RouteMatch and CTS. Her scheduling software experience will enable her to quickly acquire Trapeze PASS knowledge.
- **A Demonstrated History of High Performance in Customer Service:** [REDACTED] has consistently earned high marks and is highly praised for her abilities and past performance in customer service with passengers and clients. She personally values her customer service skills, and is proud of her excellent record.
- **Other Required Knowledge, Skills, and Abilities:**
 - Ability to Observe, Document, and Evaluate Paratransit Operations; Identify Service Problems; and Implement Effective Solutions for Complex Operational and Technical Problems: [REDACTED] overall experience as a General Manager for ADA paratransit organizations meets this criteria. Additionally, her experience as an operations and financial auditor provides her with further skill sets and experience to identify and address problems that affect service.
 - Ability to Interpret and Analyze Data and Prepare and Present Comprehensive Technical Reports and Briefings: As an auditor, [REDACTED] was required to effectively handle data and technical reports, as well as deliver briefings to all levels of her organization. Specifically, [REDACTED] developed a three-page checklist of operational and financial information that she extensively reviewed during [REDACTED] audits. In regard to briefings, [REDACTED] is a confident and engaging public speaker.
 - Success in Completing Difficult Assignments Displaying Innovative Solutions to Complex Problems: [REDACTED] is extremely skilled in developing innovative measures to control costs and coordinate complex customer service and transportation systems. In particular, as a General Manager, [REDACTED] has turned poor union environments and customer perceptions into positive experiences resulting in contract renewals. [REDACTED] has also implemented systems that have reduced overtime and mechanical failures while improving worker safety.

- Proficiency in the Review, Coordination, and Monitoring of Contractor Invoicing/Payment Disbursement: As a General Manager, [REDACTED] has the experience of creating her own financial documents and invoicing, and as an auditor [REDACTED] is keenly familiar with reviewing, coordinating, and monitoring these invoices. [REDACTED] auditing experience exposed [REDACTED] to vast methods of invoicing and payments that required [REDACTED] to develop this expertise.
- Ability to Conduct Financial Analysis and Forecasting, Coordinate Payables/Revenue Accruals, and Assist Management with Cost Impact Studies and Trend Analysis: [REDACTED] combined experiences as a General Manager and an auditor required her to conduct and review extensive financial analysis and constantly identify potential areas for savings through cost-benefit analysis.
- Ability to Use a Computer for Word Processing, Spreadsheet Analysis, Database Management, Presentation Graphics, General SQL Query Writing, Crystal Report Creation and Modification, and Other Software Applications: [REDACTED] possesses these hardware and software abilities. [REDACTED] is also a quick learner for any specifics of query or report writing that [REDACTED] may require in addition to her current skills.

18. Page 20

Your proposed process for investigating complaints is to “contact the applicable contractor(s) to obtain their view of the complaint.” Please describe in detail how you would use only the tools in Trapeze to perform an independent investigation.

As indicated within our response, MTM will not rely only on Trapeze tools to investigate complaints. While Trapeze’s data tools will be important factors in our investigation and resolution process, discussing the circumstances surrounding the complaint with all involved parties will be the most effective and customer-focused method for reaching an appropriate resolution. As part of the investigation, an MTM QA Representative will utilize the Trapeze-captured data to corroborate GPS points, MDT records, arrival and departure times, etc. with the circumstances reported by the complainant. To ensure this information is accurate, we will require all Dispatchers, Representatives, and Where’s My Ride Agents to enter all notes pertaining to trip issues under penalty of disciplinary action. However, Trapeze will not capture all aspects surrounding the complaint, as many service parameters fall outside of Trapeze’s capabilities.

As a synopsis of our proposal submission, MTM will abide by the following complaint process:

1. Receipt: WMATA's CSVC will transmit the complaint to an MTM QA Representative.
2. Documentation: The Representative will document the circumstances surrounding the complaint, including the customer-provided information and Trapeze data.
3. Investigation: The Representative will contact the involved contractor(s) to discuss the allegation and obtain their point of view.
4. Resolution: Based on the information collected, the QA Representative will determine an appropriate resolution, including any potential corrective actions.
5. Notification: All involved parties will be made aware of the resolution and corrective action steps.

19. Throughout

During the review of your firm's proposal, WMATA noticed grammatical and typographical errors. Please detail the process you would follow to ensure that reports and other documents prepared for WMATA as part of the Quality Assurance services would not contain the same types of issues.

MTM has reviewed our proposal and corrected the aforementioned errors. In the future, we will avoid similar mistakes should we be awarded the QA contract. As part of our standard process, all documents sent to external parties, including clients, customers, and other stakeholders, are thoroughly reviewed by our attentive Marketing department. Our Marketing team provides each document with an intensive, detail-oriented appraisal, correcting all grammatical, typographical, and formatting errors. Our QA General Manager will also look over all documentation to ensure no further errors are made prior to submitting it to WMATA, MetroAccess customers, or other stakeholders to which the information may be transmitted.

20. Page 10

Please clarify, in detail, how you will monitor OCC activities and what will be reported to WMATA.

MTM proposes a variety of OCC monitoring activities that will greatly benefit WMATA and its MetroAccess customers. We will hold the OCC contractor accountable for its operations through several effective methods. The primary method will be the aforementioned in-person call monitoring activities, which will be conducted for a statistically valid random sample of reservations. Through these evaluations, we are able to gain extensive details regarding customer service performance, including:

- The timeliness of answering and completing calls
- Accuracy of information acquired during intake and relayed during dispatch
- Soft skills, including representative professionalism, sensitivity, courtesy, and responsiveness to the customer's needs
- Adherence to protocols
- Accuracy of trip scheduling
- Satisfaction of the caller

Each of these categories will be assigned specific point scores, which will be transmitted electronically to Transit Miner and aggregated into trended results for reporting to WMATA. We also complete a deficiency log through which we post all performance issues for specific Customer Service Representatives. Call center supervisors then utilize these logs to provide additional customized coaching opportunities to Representatives; all additional re-training must be completed within a set deadline.

In our current operations, MTM's threshold for Customer Service Representative performance is a minimum quality score of 95%; upon contract award, we will work with WMATA to develop a satisfactory goal for this program. Other information that will be reported to WMATA and the OCC contractor outside of overall scores may include areas for potential improvement and suggested retraining. Specifically, we will conduct quarterly calibration meetings with the OCC contractor, with WMATA welcome to attend as desired. Within these meetings, we will discuss in detail all call monitoring results for the previous quarter, breaking down weaknesses and strengths of the OCC's overall operations. These meetings will be led by specific benchmarked performance information; please refer to **Attachment E** for a sample calibration report from our current District of Columbia operations for more information.

Outside of call monitoring, MTM will also thoroughly review customer service statistics such as abandonment rate, average speed to answer, average hold times, average in queue times, etc. for adherence to WMATA's expectations. This information will be reported to WMATA to ensure it remains knowledgeable about its MetroAccess customer service operations. As necessary, we will suggest liquidated damages to rectify poor performance.

21. Page 16 & Page 18

Please clarify, in detail, how you will monitor “Where is my ride?” calls. Describe how the Trapeze Tracker Action Log will be used to identify data trends that would indicate a need for further investigation, process improvement, or retraining.

By its very nature, Where’s My Ride calls occur due to a problem with the transportation. MTM firmly believes that every call to this line needs to be thoroughly investigated, as customers do not call unless service issues arise. Because every call is recorded to ensure the best customer service experience possible, MTM’s investigation into Where’s My Ride calls will start with a review of the customer interaction.

One of the most difficult issues during Where’s My Ride complaints is determining which party is responsible for creating the issue. To help identify the responsible individual, for each Where’s My Ride call we will monitor and review Trapeze Tracker Action Logs, which will document specific details regarding the trip. From this review, we will identify common problems with Service Delivery contractors and/or OCC Representatives that had a hand in the transportation arrangement. Additionally, a random sampling of calls will be monitored and evaluated on a monthly basis to identify opportunities for re-training and process improvement. Then, we can identify any trends that point to a specific service issue. For example, if a new OCC Representative is routinely booking trips without allowing for sufficient travel time to the appointment, we can identify that re-training needs to occur to prevent late trips.

At all times, we will investigate late trips, improper bookings, and other performance issues from a proactive perspective even if a customer complaint was not initiated. By doing so, we will prevent further issues and improve overall service.

22. Page 21 & Page 26

Provide your methodology and sampling strategy, including frequency, for reviewing Service Delivery Contractor performance. Include details on how the proposed "On-Street Monitoring" program will complement the road supervision responsibilities of the Service Delivery contractor(s). Also, describe how you are planning to access and use driving records of Service Delivery personnel during the on-street monitoring. Please include details of how you would ensure data integrity that would impact the accuracy of analyses and reporting.

As mentioned previously in **Question 15**, MTM's Safety and Street Supervisors will complete on-street monitoring forms via a handheld device. As part of this monitoring, the Supervisor will audit a variety of performance metrics, including:

- Punctuality of the vehicle's arrival
- Cleanliness of the vehicle
- Presence of seatbelts and shoulder belts
- Presence and correct usage of securement system
- Timeliness of the trip
- Operational safety
- Operator's assistance with wheelchair lifts and securement devices
- Operator's professional appearance
- Overall ADA compliance

At minimum, our Safety and Street Supervisors will monitor 35 trips, or 0.5% of total trips, on a daily basis. Our goal is to keep Safety and Street Supervisors in the field as much as possible as opposed to sitting behind a desk in the office. In the field, Safety and Street Supervisors will always be available to respond to incidents and accidents. We anticipate that on a normal day, these employees will devote at least seven hours to on-street monitoring, which is comprised of three main activities:

1. **Ride Checks:** Routes will be selected on the basis of recent issues or complaints with customer service or safety. Additional routes will be selected at random using either a random number generator or other method sufficient to complete the day of the Safety and Street Supervisors. Supervisors will be equipped with a copy of the selected drivers' route sheets for the day. Then, they will shadow the drivers for a 60 to 90 minute period observing vehicle cleanliness, proper driver uniform, driver safety and adherence to municipal laws and WMATA requirements, and appropriate driver-passenger interaction.

Safety and Street Supervisors will also note pick-up and drop-off times for later verification of the timeliness compared to MDT records.

2. **Facility Visits:** In addition to ride checks, we will select major trip generating locations and destinations to be visited by Safety and Street Supervisors. At these locations, Supervisors will observe drivers' arrivals and departures with regards to the same activities as noted above. In addition, the Supervisors will talk with passengers about their experience, as well as ask facility staff about what they have seen and witnessed with regards to the transportation services provided by the Service Delivery contractor. We anticipate selecting all significant facilities at least once per month for observations. Large facilities or facilities with continual issues will be selected more frequently.
3. **Contractor Site Visits:** All Service Delivery contractors will be visited by our Facility and Maintenance Monitors at least once a month. The Monitors will inspect driver and safety-sensitive employee files and records to ensure compliance with training and drug and alcohol programs. The facility will also be inspected for general safety issues, and vehicle storage protocols will be observed and reviewed. If maintenance is performed on-site, maintenance facilities will be inspected. Additionally, vehicle condition will be observed and maintenance records checked. Fuel storage and delivery systems will also be inspected if present.

As part of these activities, we will also coordinate performance-based monitoring. For example, if a Service Delivery contractor has received an increased number of complaints or service issues, we will target that provider for more extensive monitoring. Through this method, we will obtain in-depth insight as to where the specific issues lie and recommend potential solutions, such as driver re-training, suspension, or termination.

We understand that Service Delivery contractors will perform their own on-street monitoring activities, and we will avoid duplication of efforts at all costs and share results upon completion. As an example of further coordination with Service Delivery contractors, we will utilize their records in our monitoring activities.

Our Safety and Street Supervisors will be equipped with mobile tablets that will allow them to access the current driver and vehicle credentialing status, including motor vehicle reports, to verify compliance and validity of the Service Delivery contractor's personnel.

To ensure the integrity and accuracy of the monitoring data we collect, all observations will be compared to Trapeze data. Following the completion of monitoring, we will retrospectively compare our evaluations to the information collected by each vehicle's MDT such as GPS timestamps, pick-up and drop-off times, dwell times, etc. as aggregated by Trapeze and Transit Miner for each trip.

23. Page 50

Please describe in detail the level of analysis you intend to perform, including trend analysis and resulting recommendations for timely and actionable corrective actions.

As part of our standard operations, MTM analyzes benchmarked performance metrics on a monthly and annual basis. This analysis is highly in-depth in nature, and reviews a variety of performance benchmarks and thresholds as outlined within each contract's Quality Management Plan. As detailed extensively within our proposal, examples of benchmarked categories include:

- Complaint and resolution rates
- Compliance audit rates
- Customer satisfaction rates
- On-time performance rates
- Missed trip rates
- Productivity rates
- Average speed to answer
- Vehicle inspection results
- Timely reporting activities

Based on the results of our analyses, MTM is able to provide timely and actionable corrective actions for our clients to review. In **Attachment F**, MTM has included a sample Annual Evaluation Report that is based on one client's specific performance metrics and recommended actions to be taken. Upon contract award, MTM will collaborate with WMATA to develop a similar report format for this program.

24. Page 4 & Page 57

Please explain, in detail, your understanding of how MetroAccess' QA needs are currently being met and how you will meet the requirements of the QA model presented in the RFP.

While MTM is confident in our abilities to meet MetroAccess' QA needs based on our standard operating model, our level of knowledge regarding the program is reliant on the information provided within the RFP and during the response process. MTM is fully prepared to collaborate with WMATA and its Service Delivery and OCC contractors to achieve a well rounded, successful paratransit program. During implementation, we will rely heavily on the expertise brought forth by WMATA, as well as coordination efforts between our management staff and that of WMATA's other contractors. With this approach, we will bring a strict, highly compliant approach to all aspects of the MetroAccess program. Additionally, WMATA should know that MTM is open to revisiting and adjusting our QA approach, pricing, staffing, and other factors related to our initial proposal as requested and based on additional WMATA-provided information regarding the MetroAccess program.

25. N/A

Please provide a detailed plan for timely review of invoices submitted by other contractors, including those steps taken to ensure the accuracy and completeness of the invoices.

MTM will employ two MetroAccess-dedicated Billing Auditors whose sole task will be to thoroughly review all invoices submitted by the OCC and Service Delivery contractors for accuracy and completeness prior to the WMATA-specified due date. The Auditors will compare the submitted invoices to the data collected within Trapeze regarding hours, trips, and phone statistics to ensure this information corroborates the claims. MTM will randomly sample riders by phone to ensure that all trips submitted for payment were performed by the Service Delivery contractor.

As part of this process, we verify that all trips actually occurred by corroborating provider-gathered trip details, such as pick-up and drop-off times and customer signatures, with the information gathered by and recorded within our system. We will utilize the process to develop a similar plan for our MetroAccess QA operations; in summary this plan will include:

- Gathering invoice data for Service Delivery and OCC operations
- Comparing this data to the information collected by Trapeze
- Ensuring the accuracy and completeness of the invoices
- Contacting the contractor to obtain any additional information necessary
- Approving or denying invoices based on accuracy
- Submitting a detailed report regarding invoice accuracy to WMATA

26. N/A

There are a number of monthly public meetings and outreach events that occur after regular business hours. Customer feedback at these public meetings includes customer feedback on MetroAccess service, commendations, and complaints that require on-the-spot comment and follow-up investigation and response to customers. Please indicate how these meetings will be staffed, how your staff attending these events will be trained, and how your firm's participation will be coordinated with MetroAccess management.

In every contract we hold, MTM is intimately involved in education, training, and outreach activities to ensure the stakeholders we serve and work with are able to freely express their thoughts and concerns regarding our service. In our QA operations, this will include attending all after-hours monthly meetings and other outreach events. Throughout the life of this contract, we will be involved in of all scheduled meetings. In particular, our General Manager [REDACTED] will attend these meetings to listen and respond to customer feedback, commendations, and complaints. To ensure we do not overstep our limit, before each meeting [REDACTED] will coordinate with MetroAccess management to determine exactly what [REDACTED] role will be in the meeting.

[REDACTED] is a paratransit professional who will be able to provide on-the-spot, accurate responses to all inquiries. As necessary, he will instruct our staff to initiate follow-up investigations and responses to complaints. Prior to implementation, [REDACTED] will receive thorough training from CEO [REDACTED] and our other expert MTM staff. He will also attend similar stakeholder meetings in our other service markets, listening to and watching how our other General Managers respond to stakeholders. [REDACTED] has excellent communication skills and will easily take on these duties in our QA operations.

27. Page 21

Please elaborate on how the proposed in-person monitoring of OCC staff will ensure contractor compliance with WMATA standards and performance expectations.

Please refer to the previous **Question 20** which fully outlines the in-person OCC monitoring process, the data and results that will be reported to WMATA and the OCC contractor, and potential representative performance goals. Through our monitoring activities and data reviews, the thresholds for which will be based upon WMATA's goals as stated within the RFP, MTM will hold the OCC contractor to WMATA's expectations.


[REDACTED]

From: [REDACTED] [REDACTED]@mtm-inc.net]
Sent: Friday, December 07, 2012 4:27 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: RE: RFP CQ12169/KAM, Clarifications for Quality Assurance Cost Proposal

[REDACTED] - Thank you, we will provide the requested information within the timeline requested.

Regards,

[REDACTED]
CEO, MTM, Inc.
ph. [REDACTED] | cell. [REDACTED]
16 Hawk Ridge Drive, Lake Saint Louis, MO 63367
www.mtm-inc.net

 Follow me on twitter:
<https://twitter.com/amacia76>

From: [REDACTED] [mailto:[REDACTED]@wmata.com]
Sent: Friday, December 07, 2012 3:26 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: RFP CQ12169/KAM, Clarifications for Quality Assurance Cost Proposal

Good Afternoon [REDACTED]:

Please provide the following clarifications to your cost proposal to my attention by 12 Noon, Tuesday, December 11, 2012 EST.

- Provide Position Descriptions and Salary Ranges for all proposed positions
- Fringe Benefits – Provide a breakdown of all the cost elements included and percentages for each
- Profit – Explain/Justify the profit percentage (Breakdown cost drivers as needed)
- Other Ancillary costs – Explain/Justify: Administrative Support, Repair and Maintenance Costs, Depreciation cost line items
- Taxes – Please identify the taxes included
- Provide/Justify the assumed participation in the employee benefit plan

Also, please see the attachments.

This communication contains information that is confidential and is solely for the use of the intended recipient. It may contain information that is privileged and exempt from disclosure under applicable law. If you are not the intended recipient of this communication, please be advised that any disclosure, copying, distribution or unauthorized use of this communication is strictly prohibited. Please also notify MTM at 1-838-561-5747 and return the communication to the originating address.

[REDACTED]

From: [REDACTED]
Sent: Friday, December 07, 2012 4:26 PM
To: [REDACTED]@mtm-inc.net
Cc: [REDACTED]
Subject: RFP CQ12169/KAM, Clarifications for Quality Assurance Cost Proposal
Attachments: Medical Transportation Management SBLPP.docx; REPs AND CERTs - Revision Required.docx

Good Afternoon [REDACTED]:

Please provide the following clarifications to your cost proposal to my attention by 12 Noon, Tuesday, December 11, 2012 EST.

- Provide Position Descriptions and Salary Ranges for all proposed positions
- Fringe Benefits – Provide a breakdown of all the cost elements included and percentages for each
- Profit – Explain/Justify the profit percentage (Breakdown cost drivers as needed)
- Other Ancillary costs – Explain/Justify: Administrative Support, Repair and Maintenance Costs, Depreciation cost line items
- Taxes – Please identify the taxes included
- Provide/Justify the assumed participation in the employee benefit plan

Also, please see the attachments.

Medical Transportation Management, Inc. (MTM) provided the name of Cheshil Consultants, Inc. (CCI) as your subcontractor for staffing purposes. CCI is a WMATA self-certified firm and is a vendor listed in the SBLPP. However, this firm did contact SBLPP and was provided a list of 27 pages outlining WMATA self-certified firms in the areas that they requested. Additionally, the \$57,130 indicates that it is 2% of its total dollar amount. WMATA has not been advised of the total dollar amount for the first year or the following 9 years. Therefore, WMATA would need to verify your total dollar amount to ensure that you have met the 2% SBLPP goal for the total contract term. Also, there is no signed "statement of intent to contract (SOTC)" between CCI and MTM indicating that this firm is aware of their utilization on this contract and if they are in agreement. MTM would need to provide the total amount for the first year and following 9 year s; also MTM would need to provide a list of firms along with a signed "statement of intent to contract" between the firms for the 5 year base period and the 5 year option period. The "statement of intent" must be signed by both parties and to include the dollar amount for each year.

REPRESENTATIONS AND CERTIFICATIONS

Page 33, Article 7 BUY AMERICA ACT CERTIFICATION – NOT APPLICABLE

Medical Transportation Management checked both certificates, although it states not applicable. Please leave both certificates blank and resign the form and resend immediately.

[REDACTED]

From: [REDACTED] [REDACTED]@mtm-inc.net]
Sent: Wednesday, October 10, 2012 3:50 PM
To: [REDACTED]
Subject: Questions and Clarifications: RFP CQ12169/KAM for QA
Attachments: Response to Clarifications - Submitted by MTM, Inc..pdf

Dear [REDACTED]

On behalf of [REDACTED], attached please find MTM's response to the Questions and Clarifications document you sent on 10/4. Would you mind please confirming receipt?

Thanks and best regards,

[REDACTED]
Manager, Proposals
Medical Transportation Management, Inc.
[REDACTED]

Medical Transportation Management, Inc. (MTM)

Helping People Access Healthcare through Quality Transportation Management

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**Quality Assurance
Response to Clarification**

**Submitted by
Medical Transportation Management, Inc.**

October 10, 2012

Attachments

Attachment A	Amended Start-Up/Transition Plan
Attachment B	Sample Reporting Package
Attachment C	Incident Policy
Attachment D	Resume
Attachment E	Sample Calibration Report
Attachment F	Sample Annual Evaluation Report

Attachments

Attachment A

ID	Task Name	Duration	Start	Finish	Apr '13				May '13			Jun '13			Jul '13					
					31	7	14	21	28	5	12	19	26	2	9	16	23	30	7	
1	WMATA QA Implementation Plan	66 days	Mon 4/1/13	Mon 7/1/13																
2	Estimated contract award	0 days	Mon 4/1/13	Mon 4/1/13	◆ 4/1															
3	Hire management staff	10 days	Mon 4/1/13	Fri 4/12/13																
4	Transition Begins	0 days	Fri 4/12/13	Fri 4/12/13	◆ 4/12															
5	Project management	61 days	Mon 4/1/13	Mon 6/24/13																
6	Develop work plan	7 days	Mon 4/15/13	Tue 4/23/13																
7	Draft and submit to WMATA	1 day	Mon 4/15/13	Mon 4/15/13	↓ GM															
8	Review/approve work plan	5 days	Tue 4/16/13	Mon 4/22/13																
9	Finalize work plan and commence work	1 day	Tue 4/23/13	Tue 4/23/13	↓ GM															
10	Conduct kickoff meeting	1 day	Wed 4/24/13	Wed 4/24/13	↓ GM															
11	Conduct weekly status meetings with WMATA	61 days	Mon 4/1/13	Mon 6/24/13																
25	Facility	6 days	Thu 5/30/13	Thu 6/6/13																
26	Obtain utilities	1 day	Thu 5/30/13	Thu 5/30/13	↓ GM															
27	Move in	1 day	Thu 6/6/13	Thu 6/6/13	↓ GM															
28	Staffing	31 days	Thu 4/25/13	Thu 6/6/13																
29	Place employment ads	1 day	Thu 4/25/13	Thu 4/25/13	↓ GM															
30	Review resumes	10 days	Fri 4/26/13	Thu 5/9/13																
31	Interview	10 days	Fri 5/10/13	Thu 5/23/13																
32	Hire	10 days	Fri 5/24/13	Thu 6/6/13																
33	Training	35 days	Fri 5/10/13	Thu 6/27/13																
34	Develop training plan	5 days	Fri 5/10/13	Thu 5/16/13																
35	Conduct training	15 days	Fri 6/7/13	Thu 6/27/13																
36	Program Development	20 days	Thu 4/25/13	Wed 5/22/13																
37	Develop policies, processes, procedures, documents, and guidelines	10 days	Thu 4/25/13	Wed 5/8/13																
38	Approve policies, processes, procedures, documents, and guidelines	5 days	Thu 5/9/13	Wed 5/15/13																
39	Develop performance measures	5 days	Thu 5/16/13	Wed 5/22/13																
40	Information Technology	23 days	Thu 4/25/13	Mon 5/27/13																
41	Order/install IT (software, hardware, phone system, PCs)	10 days	Thu 4/25/13	Wed 5/8/13																
42	Acquire and build back office systems	5 days	Thu 5/9/13	Wed 5/15/13																
43	Develop IT policies/procedures	2 days	Mon 5/20/13	Tue 5/21/13																
44	Develop backup procedures	2 days	Wed 5/22/13	Thu 5/23/13																
45	Develop and document IT support manual	2 days	Fri 5/24/13	Mon 5/27/13																
46	Develop and document disaster recovery plan	2 days	Fri 5/24/13	Mon 5/27/13																
47	Fleet	20 days	Thu 4/25/13	Wed 5/22/13																
48	Obtain road supervision vehicles	20 days	Thu 4/25/13	Wed 5/22/13																
49	Work Commences	1 day	Mon 7/1/13	Mon 7/1/13	◆ 7/1															

Project: QA Implementation Plan Date: Fri 10/5/12	Task		External Tasks		Manual Task		Finish-only	☐
	Split		External Milestone	◆	Duration-only		Deadline	↓
	Milestone	◆	Inactive Task		Manual Summary Rollup		Progress	
	Summary		Inactive Milestone	◆	Manual Summary			
	Project Summary		Inactive Summary		Start-only	☐		

Attachment B

**MEDICAL TRANSPORTATION MANAGEMENT, INC.
CUSTOMER SERVICE CENTER PERFORMANCE REPORT**

Client Name

Year

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
Calls Received	637	479	426	384	412	433	493	572	513	547	553	521	6070
Calls Answered	575	437	398	377	404	428	478	557	496	535	503	504	5822
Ave. Speed to Answer	:28	:27	:29	:16	:16	:18	:24	:26	:26	:24	:23	:28	:27
Calls Abandoned	12	10	12	8	8	5	15	15	17	12	20	17	150
Abandonment Rate	1.88%	2.09%	2.82%	1.82%	1.94%	1.15%	3.04%	2.62%	3.31%	2.19%	3.06%	3.26%	2.43%

Sample Complaint Form
mm/yr

Last Name	First Name	MMEDC#	Appt Date	Appt Time	Comment Date	Comment	Transportation Provider Name	Resolution	Date of Resolution	Transportation Provider Education	Mgr. Review
DOE	JANE	ABC	20041214	1300	20041215	THE TRANSPORTATION PROVIDER ARRIVED LATE FOR PICK UP.	XYZ TAXI COMPANY	THE TRANSPORTATION PROVIDER STATED THE MEMBER WAS DROPPED OFF AT THE APPOINTMENT ON TIME. THE TRANSPORTATION PROVIDER WAS UNABLE TO PROVIDE SUPPORTIVE DOCUMENTATION.	20041217	THE TRANSPORTATION PROVIDER WAS EDUCATED TO CONTACT MTM AND THE MEMBER WHEN DELAYS OCCUR.	NAK
██████	██████	DEF	20041216	1430	20041220	THE MEMBER STATED THE DRIVER WAS TALKING ON THE CELL PHONE THE WHOLE RIDE. ██████ ALSO SAID THE DRIVER WAS SMOKING IN THE VEHICLE.	UJV CAB COMPANY	THE TRANSPORTATION PROVIDER STATED THE DRIVER WAS EDUCATED ABOUT SMOKING IN THE VEHICLE AND TALKING ON THEIR CELL PHONE.	20041227	THE TRANSPORTATION PROVIDER WAS EDUCATED TO PRACTICE SAFE DRIVING AND TO MAKE SURE NONE OF THEIR DRIVERS ARE SMOKING IN THE VEHICLES.	NAK
██████	██████	GHI	20041216	1430	20041220	THE MEMBER STATED THE DRIVER WAS USING FOUL LANGUAGE AND MAKING RUDE COMMENTS.	RST TAXI ENTERPRISE	THE TRANSPORTATION PROVIDER STATED THE DRIVER WAS EDUCATED ABOUT THEIR BEHAVIOR.	20041227	THE TRANSPORTATION PROVIDER WAS EDUCATED TO MAINTAIN A HIGHER LEVEL OF PROFESSIONALISM.	NAK
██████	██████	JKL	20041228	1400	20041229	THE TRANSPORTATION PROVIDER DID NOT ARRIVE FOR PICK UP. THE MEMBER HAD TO RESCHEDULE THE APPOINTMENT.	MNO TRANSPORTAION	THE TRANSPORTATION PROVIDER CONTACTED MTM. WHEN THE DRIVER ARRIVED, AND STATED THE MEMBER WAS NOT THERE.	20041230	THIS IS AN UNSUBSTANTIATED COMPLAINT AGAINST THE TRANSPORTATION PROVIDER. THE TRANSPORTATION PROVIDER WAS WITHIN MTM GUIDELINES.	NAK
██████	██████	MNO	20041220	1110	20041220	THE TRANSPORTATION PROVIDER ARRIVED LATE FOR PICK UP. THE MEMBER HAD TO RESCHEDULE THE APPOINTMENT.	TAXI CAB TRANSPORTATION	THE TRANSPORTATION PROVIDER STATED THE DRIVER ARRIVED ON TIME TO PICK UP THE MEMBER, BUT THE MEMBER CANCELLED THE TRANSPORTATION TO THE DRIVER.	20041221	THE TRANSPORTATION PROVIDER WAS EDUCATED TO CONTACT MTM WITH ANY MEMBER CANCELLATIONS.	NAK

Sample State Plan

Report Terms Defined

Additional Passengers - Any Passenger that is riding with the member that the trip is scheduled for.

Backdated - Trips that were entered into the system after they occurred.

Cancelled (Other) - All trips that were cancelled for reasons such as computer problems, misinformation, operator error, duplicate trip entered, etcetera.

Cancelled By Member - All trips that were cancelled by the member or on behalf of the member.

Cancelled By Reconciliation - All trips that were cancelled by Reconciliation for any reason.

Complaints Percentage - The total number of complaints registered divided by the total number of trip legs requested.

Completed Trip Legs - Any amount of legs that were scheduled and completed. The maximum number of legs that can be completed per trip is two.

Denied Trips - All trips that were denied for reasons such as eligibility, enrollment, service not covered, inappropriate facility, etcetera.

Member No Shows per Requested Reservation - The number of reservations that the member did not show for divided by the total number of reservations requested.

Members Received On File - The number of members who were made eligible on the file.

No Show By Member - All trips where the member either was not available for pickup or cancelled the trip to the driver at the time of pickup on any leg.

No Show By Transportation Provider - All trips where the transportation provider did not show up to pick up the member on any leg of the trip.

Number of Unique Members - The total number of members that took at least one trip.

Requested Reservation - Any trip that was requested to occur regardless of its status.

Requested Trip Leg - Any trip leg that was requested to occur regardless of its status.

Total Eligible Members - The sum of the number of members made eligible on the file plus the number of members made eligible manually.

Utilization Rate - The total number of completed trip legs plus member no shows divided by the total number of members.

Summary Information

Utilization Information	Q4-2007	Q1-2008	Q2-2008	Q3-2008	Sep	2008 YTD
Members for Whom Payment was Received	108,184	112,953	115,902	115,353	114,995	114,736
Unique Members Utilizing Transportation	3,852	3,776	3,618	4,492	2,257	8,170
Total Requested Trip Legs	32,004	34,712	34,676	38,831	13,093	108,219
Completed Trip Legs	20,174	19,788	20,428	25,606	9,214	65,822
Total Requested Reservations	17,533	18,968	18,921	20,864	7,046	58,753
Completed Trip Reservations	11,231	11,011	11,386	13,863	4,973	36,260
Member No Shows per Requested Reservation (5% or less goal)	1.81%	4.88%	4.02%	4.71%	2.75%	4.54%
Utilization Rate	6.31%	6.11%	6.09%	7.68%	8.18%	6.63%
Phone Statistics						
Calls Offered/Incoming Calls	28,191	29,491	28,085	33,862	11,406	91,438
Calls Answered	26,850	28,219	26,776	32,284	10,850	87,279
Abandon Percent (5% or less goal)	4.76%	4.31%	4.66%	4.66%	4.87%	4.55%
Average Speed of Answer	23	25	23	27	28	25
Complaint Information						
Provider No Show	223	102	130	88	29	320
Provider Timeliness	106	40	53	66	9	159
Provider Service Quality	2	1	9	5	2	15
Driver Behavior	36	16	28	13	6	57
Internal Complaint	11	11	23	31	10	65
Miscellaneous Complaint	10	1	0	0	0	1
Total Complaints	388	171	243	203	56	617
Complaint Percentage	1.21%	0.49%	0.70%	0.52%	0.43%	0.57%

Please note: Due to changes in our Quality Management (QM) reporting platform the monthly and/or quarterly complaint totals shown for January 2008 thru May 2008 may not match the monthly reports provided by our QM Department. The data provided by the QM Department during this period supersedes the data herein. Starting June 2008 the data will be equivalent.

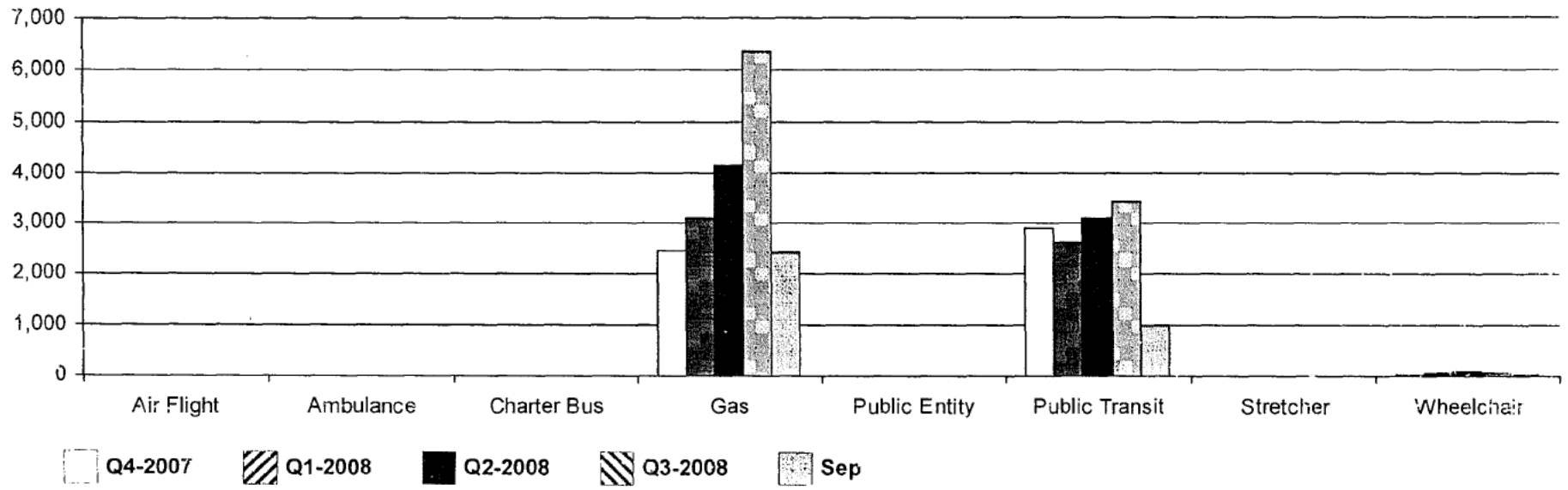
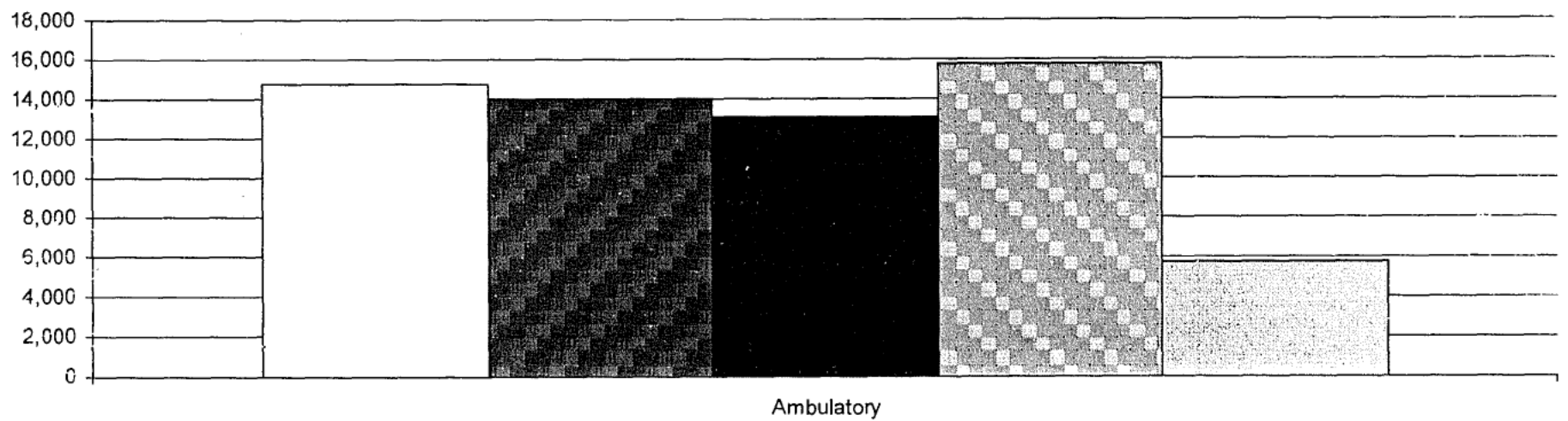
Completed Trip Legs by Vehicle Type

Vehicle Type	Q4-2007	Q1-2008	Q2-2008	Q3-2008	Sep	2008 YTD Total
Air Flight	0	0	0	0	0	0
Ambulance	2	2	0	0	0	2
Ambulatory	14,764	13,990	13,063	15,773	5,783	42,826
Charter Bus	0	0	0	0	0	0
Gas	2,456	3,104	4,162	6,346	2,418	13,612
Public Entity	0	0	0	0	0	0
Public Transit	2,910	2,621	3,118	3,424	996	9,163
Stretcher	2	0	0	0	0	0
Wheelchair	40	71	85	59	17	215
All Vehicles	20,174	19,788	20,428	25,602	9,214	65,818

Completed Trip Legs by Vehicle Type (Percent)

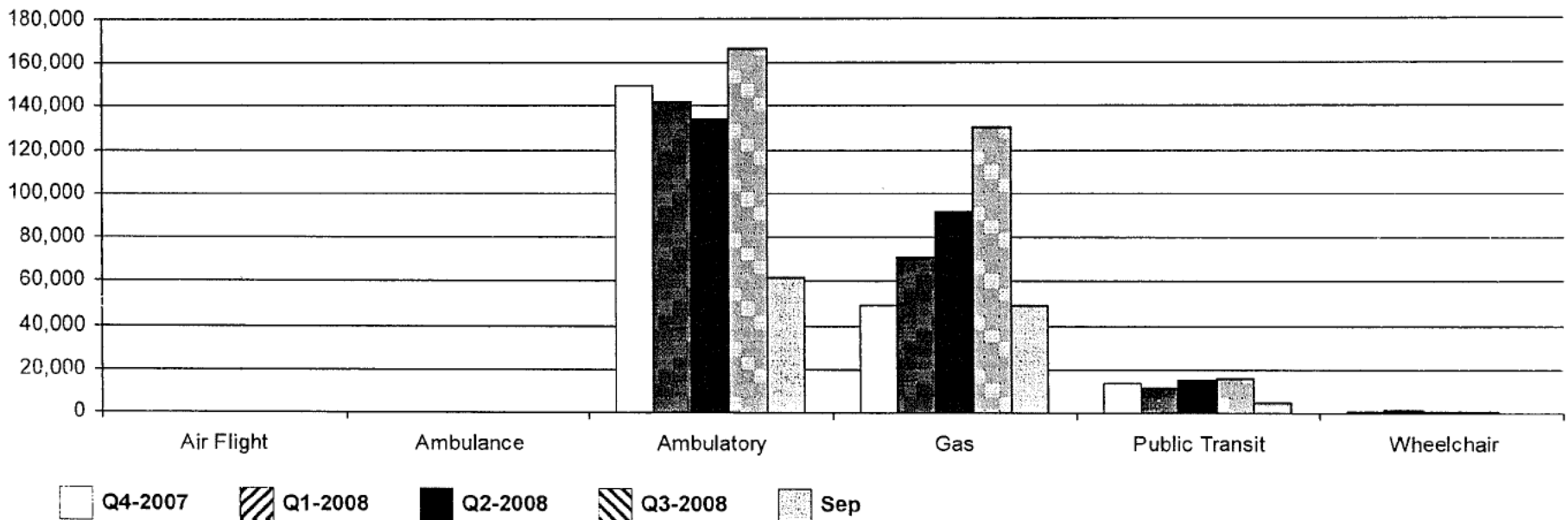
Vehicle Type	Q4-2007	Q1-2008	Q2-2008	Q3-2008	Sep	2008 YTD Total
Air Flight	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Ambulance	0.01%	0.01%	0.00%	0.00%	0.00%	0.00%
Ambulatory	73.18%	70.70%	63.95%	61.61%	62.76%	65.07%
Charter Bus	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Gas	12.17%	15.69%	20.37%	24.79%	26.24%	20.68%
Public Entity	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Public Transit	14.42%	13.25%	15.26%	13.37%	10.81%	13.92%
Stretcher	0.01%	0.00%	0.00%	0.00%	0.00%	0.00%
Wheelchair	0.20%	0.36%	0.42%	0.23%	0.18%	0.33%
All Vehicles	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Completed Trip Legs by Vehicle Type



Total Miles by Vehicle Type for Completed Trips

Vehicle Type	Q4-2007	Q1-2008	Q2-2008	Q3-2008	Sep	2008 YTD Avg
Air Flight	0	0	0	0	0	0
Ambulance	10	113	0	0	0	113
Ambulatory	149,827	142,197	134,036	166,583	61,553	442,816
Charter Bus	0	0	0	0	0	0
Gas	49,065	71,292	91,177	130,150	48,885	292,619
Public Entity	0	0	0	0	0	0
Public Transit	13,835	11,737	15,079	15,878	4,649	42,694
Stretcher	19	0	0	0	0	0
Wheelchair	485	1,434	1,116	829	202	3,379
All Vehicles	213,241	226,773	241,409	313,440	115,289	781,622

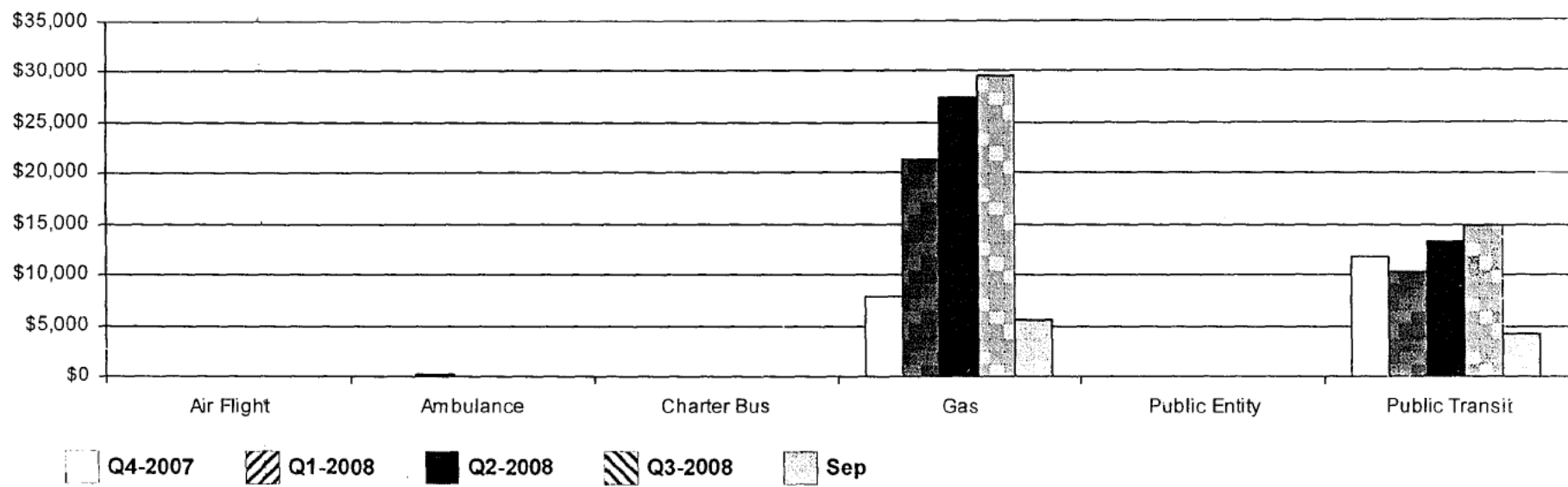
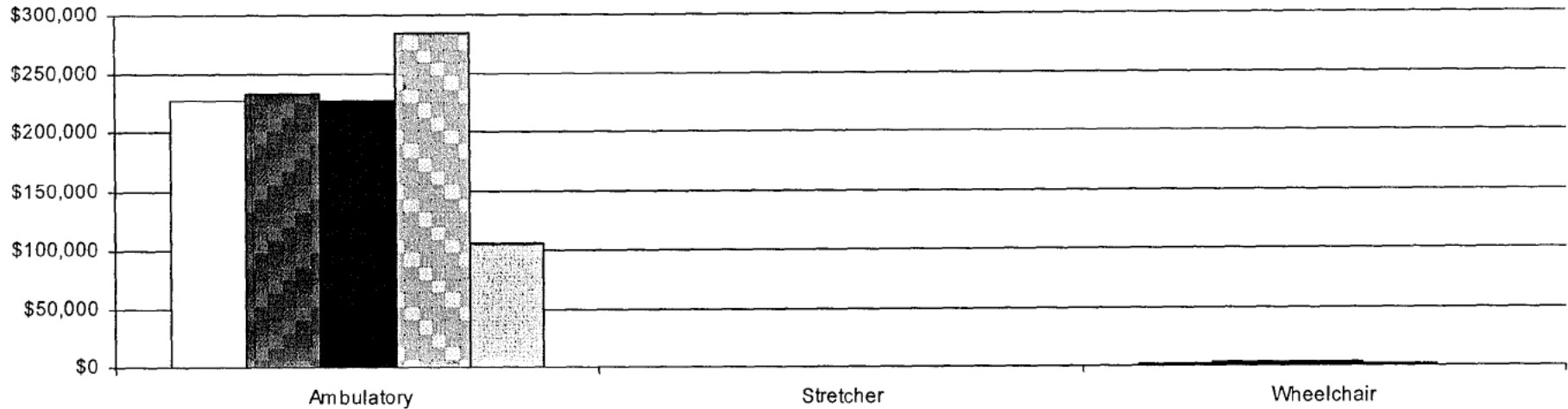


*Charter Bus, Public Entity, and Stretcher trips have been omitted from the chart due to their disproportionate distance as compared with other vehicle types.

Total Cost by Vehicle Type for Completed Trips

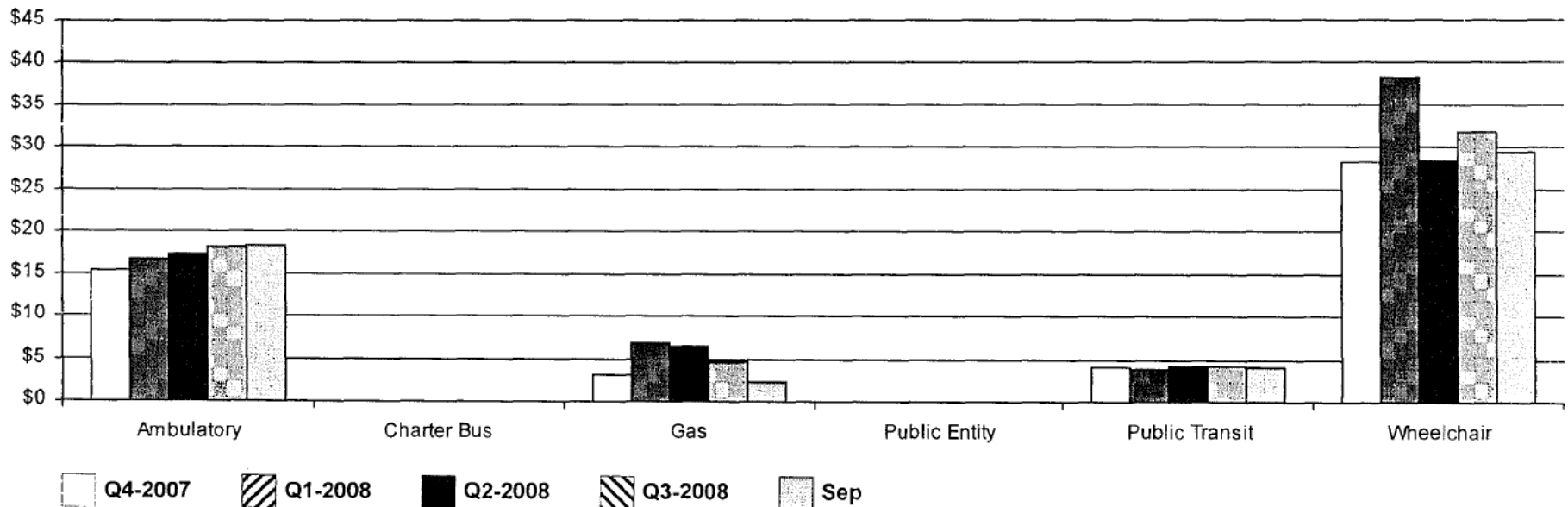
Vehicle Type	Q4-2007	Q1-2008	Q2-2008	Q3-2008	Sep	2008 YTD Total
Air Flight	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Ambulance	\$0.00	\$103.52	\$0.00	\$0.00	\$0.00	\$103.52
Ambulatory	\$227,433.15	\$232,486.40	\$226,133.36	\$285,052.12	\$105,130.27	\$743,671.88
Charter Bus	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Gas	\$7,916.23	\$21,343.50	\$27,384.48	\$29,499.54	\$5,589.90	\$78,227.52
Public Entity	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Public Transit	\$11,900.50	\$10,388.50	\$13,264.50	\$14,887.00	\$4,204.50	\$38,540.00
Stretcher	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Wheelchair	\$1,129.64	\$2,726.94	\$2,422.39	\$1,882.25	\$502.16	\$7,031.58
All Vehicles	\$248,379.52	\$267,048.86	\$269,204.73	\$331,320.91	\$115,426.83	\$867,574.50

Total Cost by Vehicle Type for Completed Trips



Average Completed Trip Leg Cost by Vehicle Type

Vehicle Type	Q4-2007	Q1-2008	Q2-2008	Q3-2008	Sep	2008 YTD Avg
Air Flight	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Ambulance	\$0.00	\$51.76	\$0.00	\$0.00	\$0.00	\$51.76
Ambulatory	\$15.40	\$16.62	\$17.31	\$18.07	\$18.18	\$17.36
Charter Bus	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Gas	\$3.22	\$6.88	\$6.58	\$4.65	\$2.31	\$5.75
Public Entity	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Public Transit	\$4.09	\$3.96	\$4.25	\$4.35	\$4.22	\$4.21
Stretcher	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Wheelchair	\$28.24	\$38.41	\$28.50	\$31.90	\$29.54	\$32.71
All Vehicles	\$12.31	\$13.50	\$13.18	\$12.94	\$12.53	\$13.18



*Air Flight, Ambulance, and Stretcher trips have been omitted from the chart due to their disproportionate cost as compared with other vehicle types.

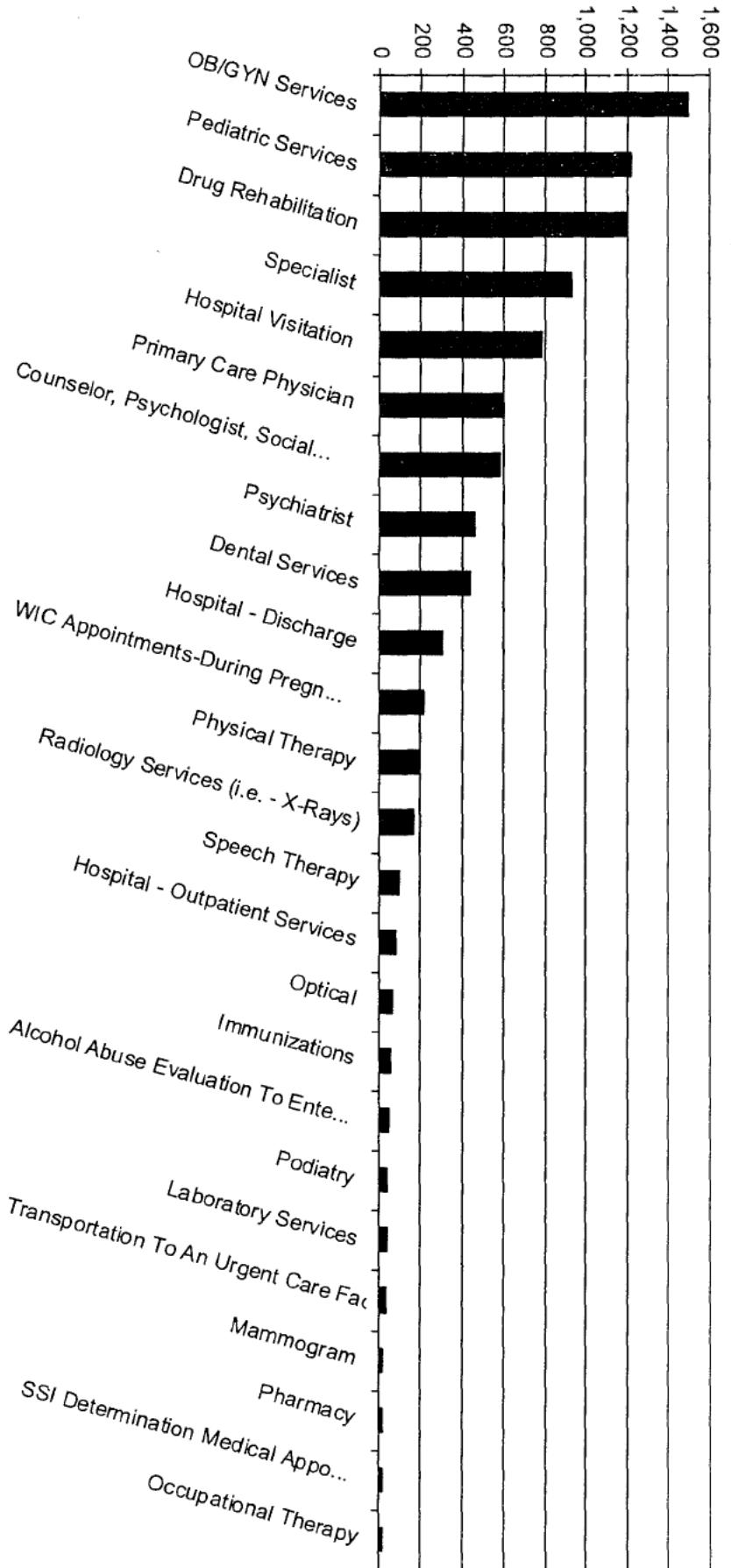
Completed Trip Legs by Trip Reason Code

Reason Code	Trip Legs	Percent of All	Total Miles	Average Miles
40 OB/GYN Services	1,492	16.19%	14,090	9.44
48 Pediatric Services	1,213	13.16%	9,888	8.15
53 Drug Rehabilitation	1,197	12.99%	14,193	11.86
68 Specialist	928	10.07%	14,296	15.40
36 Hospital Visitation	787	8.54%	18,542	23.56
23 Primary Care Physician	586	6.36%	6,089	10.39
29 Counselor, Psychologist, Social Worker	578	6.27%	8,151	14.10
28 Psychiatrist	458	4.97%	6,579	14.36
3 Dental Services	431	4.68%	6,238	14.47
10 Hospital - Discharge	302	3.28%	2,150	7.12
99 WIC Appointments-During Pregnancy	215	2.33%	1,539	7.16
22 Physical Therapy	184	2.00%	2,505	13.61
42 Radiology Services (i.e. - X-Rays)	167	1.81%	2,221	13.30
94 Speech Therapy	102	1.11%	1,757	17.23
12 Hospital - Outpatient Services	80	0.87%	1,384	17.30
17 Optical	65	0.71%	540	8.31
13 Immunizations	54	0.59%	626	11.59
1 Alcohol Abuse Evaluation To Enter Treatment	52	0.56%	81	1.55
24 Podiatry	40	0.43%	607	15.18
14 Laboratory Services	39	0.42%	346	8.87
60 Transportation To An Urgent Care Facility	31	0.34%	494	15.94
38 Mammogram	20	0.22%	148	7.39
21 Pharmacy	19	0.21%	122	6.41

Completed Trip Legs by Trip Reason Code

Reason Code	Trip Legs	Percent of All	Total Miles	Average Miles
96 SSI Determination Medical Appointments	18	0.20%	229	12.74
15 Occupational Therapy	17	0.18%	306	18.02
70 Education/Outreach Programs	15	0.16%	169	11.27
9 Hospital - Inpatient Services/Admission	12	0.13%	179	14.91
34 Chemotherapy	12	0.13%	84	6.97
47 Vision/Hearing Screenings	12	0.13%	164	13.69
56 Lamaze Classes (Or Similar Birthing Class)	12	0.13%	201	16.77
61 Transportation From An Urgent Care Facility	11	0.12%	133	12.06
20 Pain Management	11	0.12%	238	21.59
43 Transplant Services	10	0.11%	554	55.36
33 Diabetic Supplies And Education	6	0.07%	58	9.72
58 Ophthalmologist	6	0.07%	62	10.26
72 Emergency Room-From	5	0.05%	24	4.78
41 Radiation Treatments	4	0.04%	35	8.75
27 Prosthetic	4	0.04%	94	23.57
8 Hearing Aids	4	0.04%	42	10.51
4 Dialysis	4	0.04%	14	3.51
66 Weight Control Programs	4	0.04%	51	12.75
25 Prenatal Services	2	0.02%	3	1.34
6 Durable Medical Equipment	2	0.02%	25	12.43
81 Alcohol Rehabilitation	2	0.02%	25	12.28
5 Drug Abuse Evaluation To Enter Treatment	1	0.01%	16	15.61
Total	9,214	100.00%	115,289	12.51

Completed Trip Legs by Trip Reason Code (Most Costly)



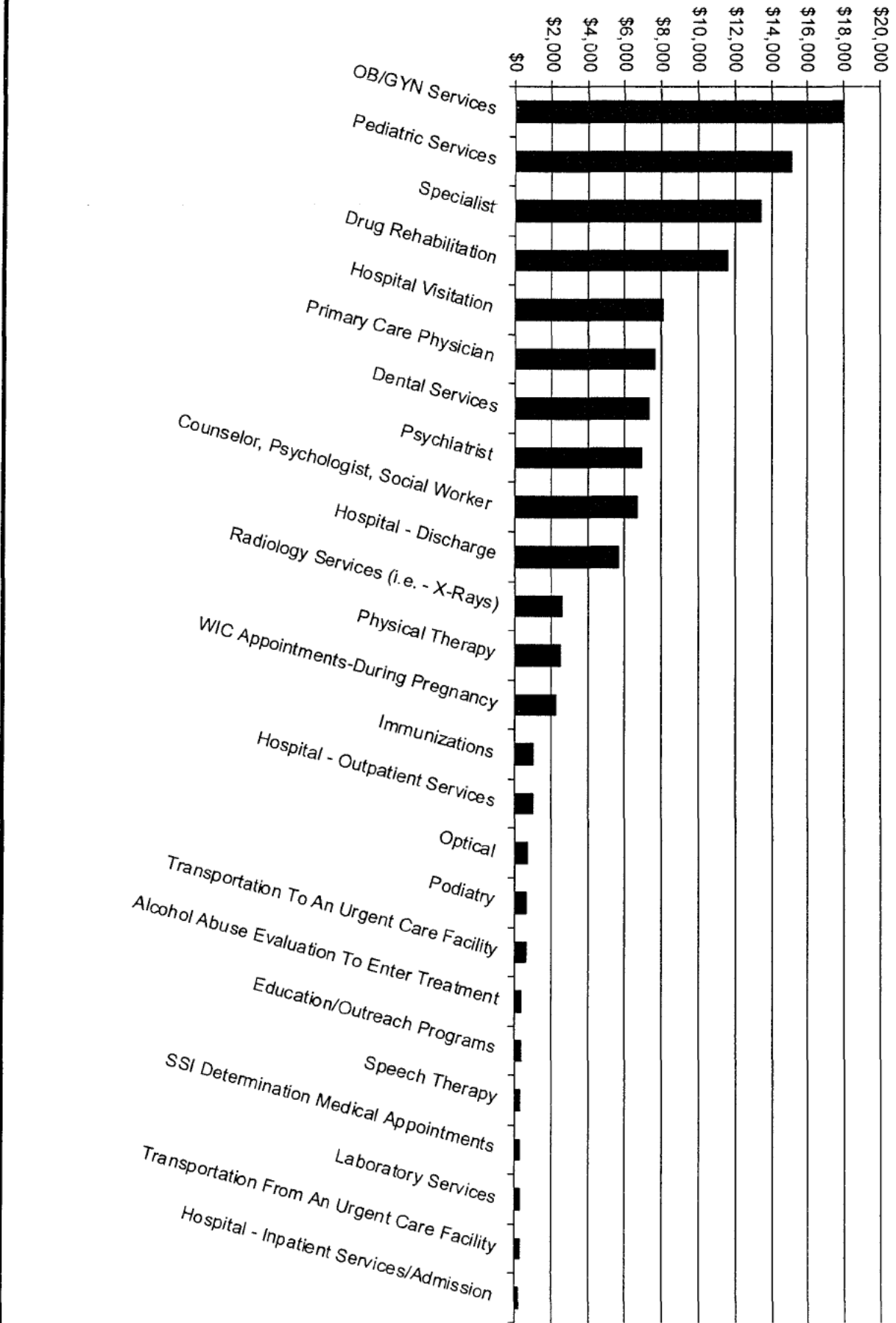
Total Cost by Trip Reason Code for Completed Trips

Reason Code	Total Cost	Per Leg Cost	Percent of All
40 OB/GYN Services	\$17,881.74	\$11.99	15.49%
48 Pediatric Services	\$15,130.91	\$12.47	13.11%
68 Specialist	\$13,396.91	\$14.44	11.61%
53 Drug Rehabilitation	\$11,617.49	\$9.71	10.06%
36 Hospital Visitation	\$8,099.34	\$10.29	7.02%
23 Primary Care Physician	\$7,581.51	\$12.94	6.57%
3 Dental Services	\$7,272.85	\$16.87	6.30%
28 Psychiatrist	\$6,901.20	\$15.07	5.98%
29 Counselor, Psychologist, Social Worker	\$6,675.71	\$11.55	5.78%
10 Hospital - Discharge	\$5,670.30	\$18.78	4.91%
42 Radiology Services (i.e. - X-Rays)	\$2,591.49	\$15.52	2.25%
22 Physical Therapy	\$2,453.16	\$13.33	2.13%
99 WIC Appointments-During Pregnancy	\$2,210.59	\$10.28	1.92%
13 Immunizations	\$988.68	\$18.31	0.86%
12 Hospital - Outpatient Services	\$969.19	\$12.11	0.84%
17 Optical	\$728.70	\$11.21	0.63%
24 Podiatry	\$628.62	\$15.72	0.54%
60 Transportation To An Urgent Care Facility	\$603.46	\$19.47	0.52%
1 Alcohol Abuse Evaluation To Enter Treatment	\$416.00	\$8.00	0.36%
70 Education/Outreach Programs	\$370.77	\$24.72	0.32%
94 Speech Therapy	\$337.86	\$3.31	0.29%
96 SSI Determination Medical Appointments	\$325.76	\$18.10	0.28%
14 Laboratory Services	\$302.02	\$7.74	0.26%
61 Transportation From An Urgent Care Facility	\$283.73	\$25.79	0.25%
9 Hospital - Inpatient Services/Admission	\$268.07	\$22.34	0.23%

Total Cost by Trip Reason Code for Completed Trips

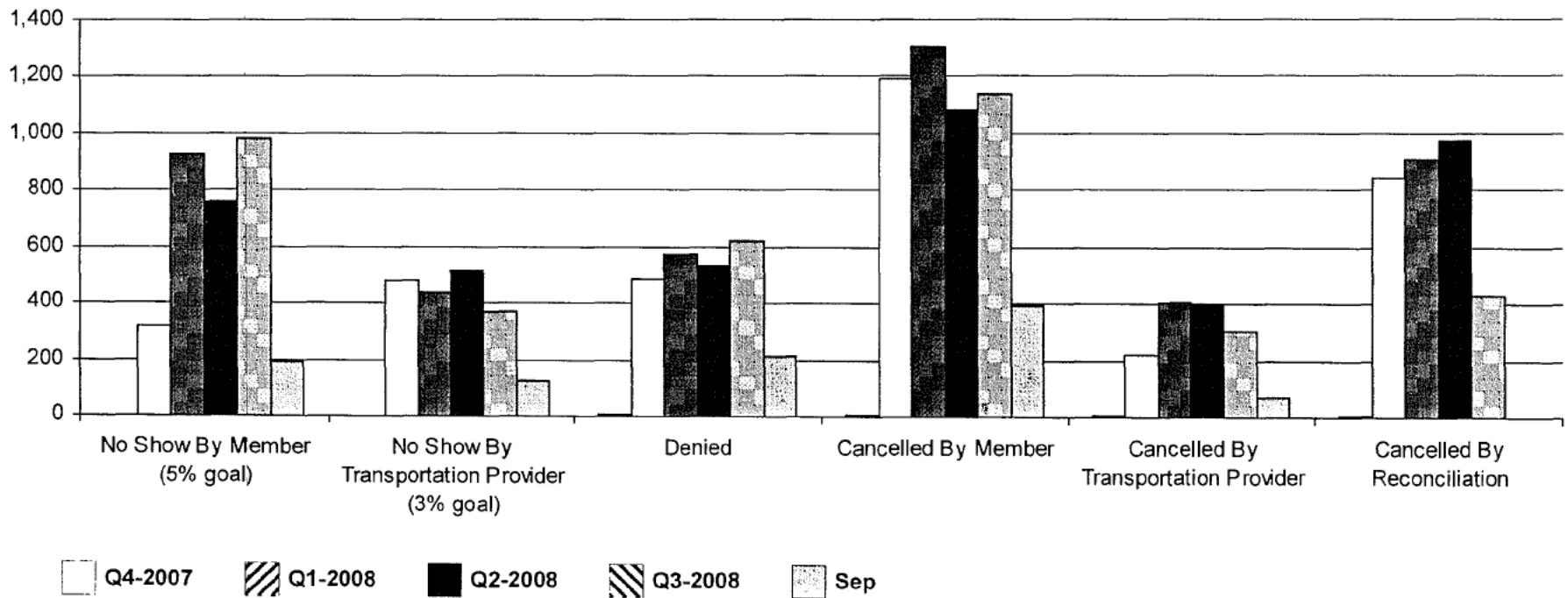
Reason Code	Total Cost	Per Leg Cost	Percent of All
38 Mammogram	\$227.72	\$11.39	0.20%
27 Prosthetic	\$166.90	\$41.73	0.14%
15 Occupational Therapy	\$164.71	\$9.69	0.14%
20 Pain Management	\$163.92	\$14.90	0.14%
47 Vision/Hearing Screenings	\$157.23	\$13.10	0.14%
21 Pharmacy	\$154.64	\$8.14	0.13%
34 Chemotherapy	\$137.18	\$11.43	0.12%
56 Lamaze Classes (Or Similar Birthing Class)	\$108.34	\$9.03	0.09%
58 Ophthalmologist	\$76.48	\$12.75	0.07%
72 Emergency Room-From	\$70.30	\$14.06	0.06%
6 Durable Medical Equipment	\$69.32	\$34.66	0.06%
41 Radiation Treatments	\$55.04	\$13.76	0.05%
4 Dialysis	\$39.00	\$9.75	0.03%
33 Diabetic Supplies And Education	\$35.50	\$5.92	0.03%
81 Alcohol Rehabilitation	\$34.06	\$17.03	0.03%
5 Drug Abuse Evaluation To Enter Treatment	\$33.75	\$33.75	0.03%
8 Hearing Aids	\$17.68	\$4.42	0.02%
25 Prenatal Services	\$9.00	\$4.50	0.01%
43 Transplant Services	\$0.00	\$0.00	0.00%
66 Weight Control Programs	\$0.00	\$0.00	0.00%
Total	\$115,426.83	\$12.53	100.00%

Total Cost by Trip Reason Code for Completed Trips (Most Costly)



Incomplete Reservations

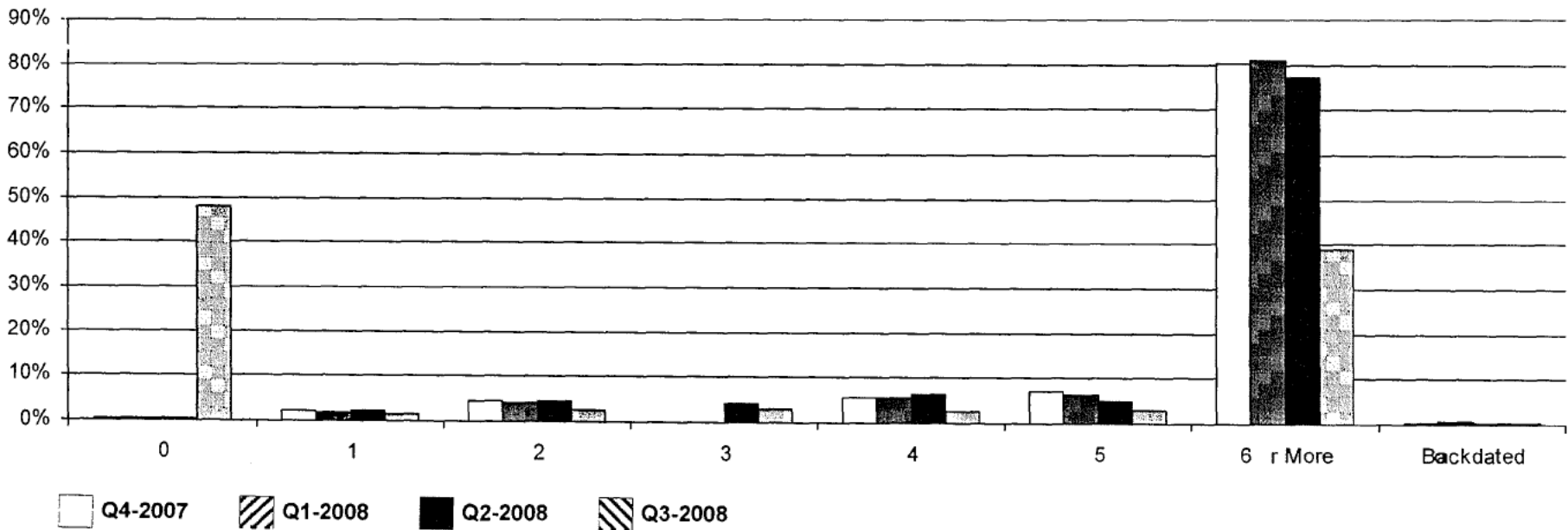
Reason	Q4-2007	Q1-2008	Q2-2008	Q3-2008	Sep	2008 YTD
No Show By Member (5% goal)	317	925	760	983	194	2,668
No Show By Transportation Provider (3% goal)	481	436	516	368	124	1,320
Denied	483	574	534	620	214	1,728
Cancelled By Member	1,189	1,305	1,080	1,138	394	3,523
Cancelled By Transportation Provider	224	406	402	303	74	1,111
Cancelled By Reconciliation	846	907	974	431	0	2,312
Other	2,762	3,404	3,269	3,158	1,073	9,831
Total	6,302	7,957	7,535	7,001	2,073	22,493



Days of Notice for Completed Reservations

Notice	Ambulance	Public Transit	Ambulatory	Charter Bus	Wheelchair	Stretcher	Total	Percent	Gas
0	0	0	565	0	0	0	565	15.13%	226
1	0	9	344	0	0	0	353	9.45%	80
2	0	28	181	0	0	0	209	5.60%	38
3	0	28	212	0	1	0	241	6.45%	33
4	0	22	191	0	0	0	213	5.70%	40
5	0	31	213	0	2	0	246	6.59%	31
6 or More	0	382	1,519	0	6	0	1,907	51.07%	777
Backdated	0	0	0	0	0	0	0	0.00%	14
Total Trips	0	500	3,225	0	9	0	3,734	100.00%	1,239

*This report excludes Air Flight and Public Entity trips. Percentage also excludes gas trips.

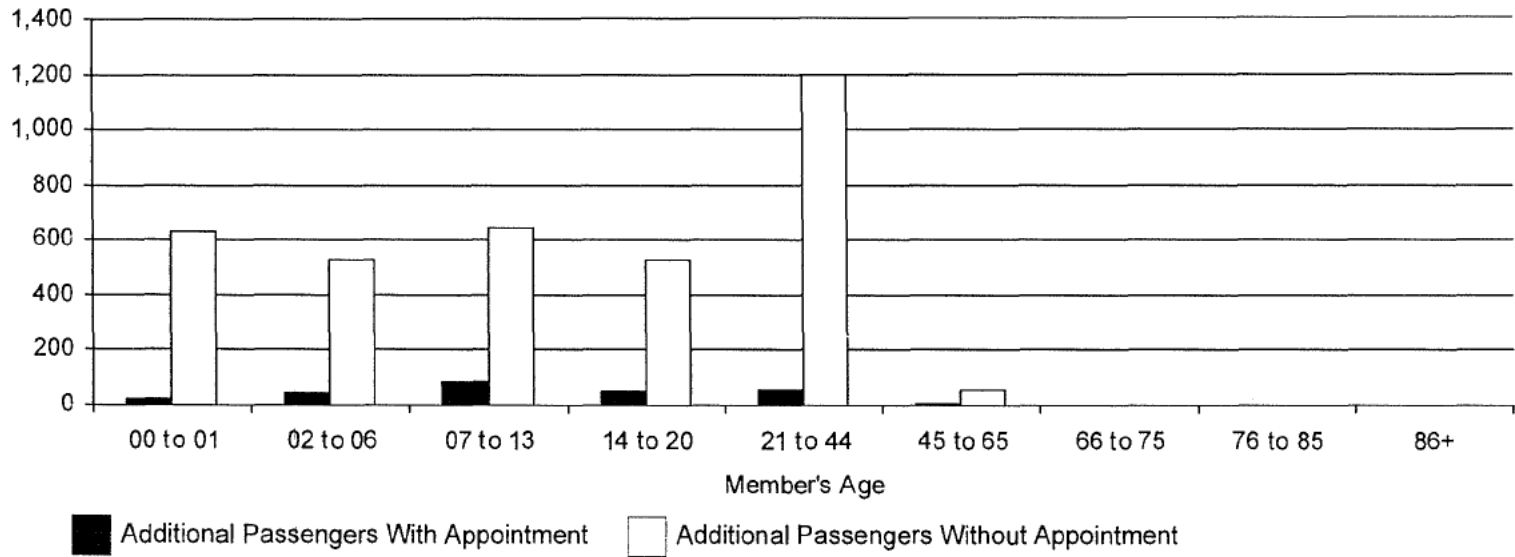


*This chart excludes Gas trips.

Additional Passengers for Completed Reservations

Member's Age	Total Reservations	Additional Passengers w/ Appointment	Additional Passengers w/o Appointment	Total People Transported
00 to 01	714	24	630	1,368
02 to 06	509	44	527	1,080
07 to 13	636	83	643	1,362
14 to 20	714	48	528	1,290
21 to 44	2,254	54	1,194	3,502
45 to 65	146	5	59	210
66 to 75	0	0	0	0
76 to 85	0	0	0	0
86+	0	0	0	0
Total	4,973	258	3,581	8,812

*Some reservations have been omitted for lack of member age information.



Transportation Provider Information

Transportation Provider	Minority Owned	Woman Owned	Ambulatory Legs	% of All Ambulatory	Wheelchair Legs	% of All Wheelchair	Member No Shows	Provider No Shows
Transportation Provider 12	No	No	337	5.83%	0	0.00%	0.00%	0.87%
Transportation Provider 13	No	No	9	0.16%	0	0.00%	0.00%	0.00%
Transportation Provider 15	No	No	119	2.06%	0	0.00%	0.00%	1.63%
Transportation Provider 16	No	No	0	0.00%	6	35.29%	0.00%	0.00%
Transportation Provider 2	No	No	275	4.76%	6	35.29%	1.33%	2.66%
Transportation Provider 20	No	No	86	1.49%	0	0.00%	4.72%	5.66%
Transportation Provider 21	No	No	0	0.00%	2	11.76%	0.00%	0.00%
Transportation Provider 22	No	No	2	0.03%	0	0.00%	0.00%	0.00%
Transportation Provider 28	No	No	66	1.14%	0	0.00%	0.00%	2.86%
Transportation Provider 3	No	No	1,201	20.77%	0	0.00%	2.16%	0.48%
Transportation Provider 31	No	No	188	3.25%	3	17.65%	15.02%	0.37%
Transportation Provider 32	No	No	3	0.05%	0	0.00%	0.00%	0.00%
Transportation Provider 37	No	No	452	7.82%	0	0.00%	1.05%	1.69%
Transportation Provider 4	No	No	37	0.64%	0	0.00%	4.88%	0.00%
Transportation Provider 43	No	No	179	3.10%	0	0.00%	12.45%	1.66%
Transportation Provider 45	No	No	2	0.03%	0	0.00%	0.00%	33.33%
Transportation Provider 46	No	No	89	1.54%	0	0.00%	2.11%	1.05%
Transportation Provider 47	No	No	140	2.42%	0	0.00%	2.63%	1.32%
Transportation Provider 48	No	No	16	0.28%	0	0.00%	0.00%	0.00%
Transportation Provider 49	No	No	511	8.84%	0	0.00%	5.39%	1.39%
Transportation Provider 5	No	No	2,003	34.64%	0	0.00%	1.67%	3.25%
Transportation Provider 7	No	No	32	0.55%	0	0.00%	0.00%	2.94%
Transportation Provider 9	No	No	36	0.62%	0	0.00%	2.63%	0.00%
Total			5,783	100.00%	17	100.00%	2.98%	1.96%

Pick Up and Drop Off Counties for Completed Reservations

Pick Up Counties

ST	County	Reservations
MO	Camden	1
SS	Big Town	2
SS	East Town	25
SS	Eastland	148
SS	Happyville	52
SS	Lake Town	2,137
SS	Little Place	367
SS	Metropolis	127
SS	Middle Town	1
SS	New Town	1,938
SS	North City	1
SS	Olde Town	1
SS	River's Edge	106
SS	Saint Town	39
SS	South City	1
SS	West Town	27
Total Reservations		4,973

Drop Off Counties

ST	County	Reservations
NS	River City	1
SS	Big County	1
SS	Big Town	4
SS	East Town	7
SS	Eastland	31
SS	Happy Town	2
SS	Happyville	3
SS	Lake Town	2,399
SS	Little Place	210
SS	Little Town	1
SS	Metropolis	44
SS	Middleville	1
SS	New Town	2,173
SS	North City	9
SS	Olde Town	1
SS	River's Edge	30
SS	Rural County	14
SS	Saint Town	26
SS	South City	4
SS	West Town	12
Total Reservations		4,973

Top 5 Pick Up and Drop Off Locations for Completed Reservations

Pick Up Location: SS, Lake Town

Total Reservations: 2,137

Dropped Off At	Reservations
- SS, Lake Town	1515
- SS, New Town	607
- SS, Little Place	7
- SS, Eastland	4
- SS, West Town	1
- SS, Saint Town	1
- SS, East Town	1
- SS, Happyville	1

Drop Off Location: SS, Lake Town

Total Reservations: 2,399

Picked Up From	Reservations
- SS, Lake Town	1,515
- SS, New Town	754
- SS, Eastland	53
- SS, Little Place	25
- SS, Happyville	21
- SS, West Town	8
- SS, Metropolis	7
- SS, River's Edge	7
- SS, Saint Town	5
- SS, East Town	3
- SS, Olde Town	1

Pick Up Location: SS, New Town

Total Reservations: 1,938

Dropped Off At	Reservations
- SS, New Town	1142
- SS, Lake Town	754
- SS, Little Place	36
- SS, Eastland	4
- SS, River's Edge	2

Drop Off Location: SS, New Town

Total Reservations: 2,173

Picked Up From	Reservations
- SS, New Town	1,142
- SS, Lake Town	607
- SS, Little Place	223
- SS, Metropolis	74
- SS, Eastland	71
- SS, River's Edge	38
- SS, Saint Town	9
- SS, East Town	4

Pick Up Location: SS, Little Place

Total Reservations: 367

Dropped Off At	Reservations
- SS, New Town	223
- SS, Little Place	113

Top 5 Pick Up and Drop Off Locations for Completed Reservations

- SS, Lake Town	25
- SS, River's Edge	5
- SS, East Town	1

- SS, West Town	3
- SS, Happyville	1
- SS, South City	1

Pick Up Location: SS, Eastland

Total Reservations: 148

Dropped Off At	Reservations
- SS, New Town	71
- SS, Lake Town	53
- SS, Eastland	16
- SS, Saint Town	5
- SS, Metropolis	1
- SS, Olde Town	1
- SS, Little Place	1

Drop Off Location: SS, Little Place

Total Reservations: 210

Picked Up From	Reservations
- SS, Little Place	113
- SS, River's Edge	38
- SS, New Town	36
- SS, East Town	13
- SS, Lake Town	7
- SS, Happyville	1
- SS, Eastland	1
- SS, Saint Town	1

Pick Up Location: SS, Metropolis

Total Reservations: 127

Dropped Off At	Reservations
- SS, New Town	74
- SS, Metropolis	41
- SS, Lake Town	7
- SS, Happy Town	2
- SS, North City	1
- SS, Big County	1
- NS, River City	1

Drop Off Location: SS, Metropolis

Total Reservations: 44

Picked Up From	Reservations
- SS, Metropolis	41
- SS, West Town	2
- SS, Eastland	1

Drop Off Location: SS, Eastland

Total Reservations: 31

Picked Up From	Reservations
----------------	--------------

Top 5 Pick Up and Drop Off Locations for Completed Reservations

- SS, Eastland	16
- SS, Saint Town	5
- SS, New Town	4
- SS, Lake Town	4
- SS, West Town	2

Satisfaction Survey Results

Phone Service Benchmark: 95% Transportation Provider Service Benchmark: 92%

Current Month 9-2008		Completed:	187	Refused:	54	Unavailable:	93	Unaccounted:	0
Questions Regarding Phone Service			Yes	No	Questions Regarding Transportation Provider			Yes	No
All Questions			97.68%		All Questions			96.52%	
Was your call answered promptly?			179	8	Was the driver's conduct professional and courteous?			181	6
Was the operator helpful?			187	0	Did the driver have identification?			179	8
Did they state the name of your health plan when they answered?			179	8	Did you arrive to your appointment on time?			179	8
Was your trip scheduled while you were on the phone?			187	0	For your return ride, did the driver pick you up within 1 hour?			180	7
Did the operator remind you to be ready an hour before your appointment?			179	8	Was the vehicle clean?			179	8
Did the operator explain how to change or cancel your trip?			185	2	Did the vehicle have working seat belts?			185	2

Previous Quarter: Q2-2008		Completed:	652
Questions Regarding Phone Service		Yes	
Responses		97.90%	
Questions Regarding Transportation Provider		Yes	
Responses		98.26%	

Year-To-Date: 2008		Completed:	1,839
Questions Regarding Phone Service		Yes	
Responses		97.31%	
Questions Regarding Transportation Provider		Yes	
Responses		97.53%	

Attachment C



MTM
Medical Transportation
Management, Inc.

Page: Page 1 of 3	File Code: 408
Effective Date: 8/23/2001	Revision Issue Date: 3/12/2012
Subject: Reporting and Handling of Accidents/Incidents	Authorized by: President/CEO
Applicability: MTM Corporate	Department: Quality Management

CORPORATE POLICY

I. PURPOSE

To define a process for handling, documenting and reporting information relating to accidents and incidents involving members.

II. POLICY

All information regarding accidents and incidents will be maintained, handled and reported according to MTM established policies and procedures.

Definitions:

Client: refers to the customer contracted with MTM to handle the transportation benefit offered to their covered population.

Member: refers to the population served by MTM Clients. Often referred to as participants, beneficiaries, clients, members and other terms, for MTM purposes, member is being used as a standard meaning for the Client's covered population

Accident: Any mishap involving a subcontracted transportation provider's vehicle and a recipient. This includes, but not limited to a fender bender, blown tire, etc.

Incident: Any non-vehicular mishap involving a recipient while in the care of a MTM transportation provider. This includes, but not limited to the passenger falls while trying to enter the vehicle, a passenger falls while walking to the vehicle, etc.

Serious Accident/Incident: Any report of death, allegation of abuse, including sexual misconduct, neglect, serious physical injury, improper use of restraints, suicide attempt or threat and missing person.

III. RESPONSIBILITY

1. All accidents/incidents are reported directly to the Quality Management Department (QM). Reporting timeframes shall be as follows:
 - a. All accidents/incidents considered an "Internal Alert" shall be reported by the Compliance Auditor to MTM's General Counsel, Manager, Quality Management, Network Management Manager, Client Services designee and Client immediately.
 - b. All other accidents/incidents shall be reported to the appropriate parties in accordance to the contractually obligated timeframe.



MTM
Medical Transportation
Management, Inc.

Page: Page 2 of 3	File Code: 408
Effective Date: 8/23/2001	Revision Issue Date: 3/12/2012
Subject: Reporting and Handling of Accidents/Incidents	Authorized by: President/CEO
Applicability: MTM Corporate	Department: Quality Management

CORPORATE POLICY

- c. Information received is to be logged immediately into the appropriate documentation systems, i.e., Non Emergency Transportation (NET) Management System and other specific databases in which information is logged and maintained.
2. The designated QM staff will request that the transportation provider complete an accident/incident form and submit it to MTM QM Department within twenty-four hours of the accident/incident.
3. Regardless of the type of incident/accident, if a driver is suspected of being at fault they must submit to drug and alcohol testing. Post-accident/incident drug and alcohol tests must be performed immediately following an accident/incident.
4. Once the results are back, the Managers of Quality Management and Network Management will work with the owner or managing official of the company regarding the results. If the results are found to be negative, the driver will be allowed to continue working.
5. In any situation involving a fatality, missing person, or sexual misconduct on behalf of the driver the following must be informed:
 - a. General Counsel
 - b. Chief Financial Officer
 - c. Manager, Quality Management
 - d. Manager, Network Management
 - e. Vice President, Paratransit
 - f. Marketing designee (if the media is involved)
 - g. President/CEO
 - h. Account Manager
 - i. Vice President, Client Services
6. General Counsel will determine if MTM's Liability Insurance Carrier is to be notified.
7. All reports of the accident/incident will be documented and saved electronically. The Compliance Auditor will check MTM records for copies of current insurance, driver training records, driver background check and DMV record for the driver involved.
8. When there is a fatality involved, Network Management will complete an on-site visit within 3-5 business days. If deficiencies are found, all future trips may be cancelled until corrected. Whenever there is a loss of human life, each surviving safety sensitive employee operating the vehicle at the time of the accident/incident must be tested. Safety-sensitive employees not in the vehicle (e.g., attendants), whose performance could have contributed to the accident/incident must also be tested.
9. General Counsel reserves the right to determine the necessity of an on-site visit and the time line of completion regardless of the circumstances.
10. All inquires by the media will be forwarded to the Marketing designee and General Counsel.



MTM
Medical Transportation
Management, Inc.

Page: Page 3 of 3	File Code: 408
Effective Date: 8/23/2001	Revision Issue Date: 3/12/2012
Subject: Reporting and Handling of Accidents/Incidents	Authorized by: President/CEO
Applicability: MTM Corporate	Department: Quality Management

CORPORATE POLICY

This policy is reviewed by the Quality Management Committee on an annual basis for appropriateness and effectiveness.

APPROVED BY:

[Redacted Signature]	8/2/12
Manager, Quality Management	Date
[Redacted Signature]	8-10-12
Chief Financial Officer	Date
[Redacted Signature]	8-16-12
President/CEO	Date

Attachment D

Results-focused senior operations executive offering extensive experience positioning transportation organizations for growth, increased performance goals, and improved productivity. Direct, proactive approach combined with strategic vision has transformed million dollar losses into strong profit performance in months. Proven strengths in operations, human resources, and business development. Ability to establish strong relationships with top decision-makers and interface extensively across all business disciplines for improved collaboration and performance. Committed to quality business and bottom-line results.

PROFESSIONAL EXPERIENCE

[REDACTED] 2009 – Present

Transportation Service Provider for [REDACTED] Program for the Elderly & Disabled; 200 + Employees; 7M annual revenue

Operations Manager

- ◆ Evaluate and monitor on-time performance, exceeding contract requirements of 95% weekly missed runs; revenue cost data; total work/ pay hours; customer complaint data; and accident data
- ◆ Track and maintain employee attendance system
- ◆ Assist in developing procedure manuals for dispatchers, road supervisors, operators, and service personnel
- ◆ Manage manpower requirements for 14 dispatchers, 145 operators, and 50 staff associates
- ◆ Identify safety concerns and assist safety department in the continuous re-training of employees
- ◆ Stabilize workforce to ensure operator and staff success by giving operators the necessary tools, documentation, and proper working equipment
- ◆ Develop business tools and solutions based on knowledge, product, and technology to identify process improvement opportunities through strategic thinking, critical thinking, and analysis.
- ◆ Provide discipline and/ or coaching for operators and staff to ensure a high level of performance and professionalism

[REDACTED] 2009

Transportation Service Provider for [REDACTED] Program for the Elderly & Disabled; 500 + Employees 20M annual revenue

Special Projects Manager

- ◆ Responsible for training dispatchers on how to communicate effectively with clients
- ◆ Reconstructed and organized staff schedules to suit operational needs
- ◆ Designed and reorganized base assignments workload
- ◆ Conducted site visits and made recommendations to dispatchers on how to communicate clearly with drivers on location of site for pick-up)
- ◆ Maintained positive employee relations and morale
- ◆ Practiced sound leadership and human relations principles to promote teamwork at all times
- ◆ Set a good personal example of attitude and performance.
- ◆ Used analytical methods and a variety of tools to understand, predict, improve, or control operations and processes
- ◆ Created schedules for over 500 drivers
- ◆ Deployed 400 weekday routes and 120 weekend routes
- ◆ Worked with dispatch management to provide schedules for 20 dispatchers

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

2008 - 2009

Transportation Service Provider for [REDACTED] Program for the Elderly & Disabled; 200 + Employees; 2M annual revenue

General Manager

- ◆ Developed and executed quality control programs to ensure the highest level of service
- ◆ Identified, selected, trained, and mentored location staff
- ◆ Effectively and frequently communicated with staff and support team members
- ◆ Oversaw vehicle maintenance plan and ensured fleet availability to meet service requirements
- ◆ Oversaw safety and training programs, plans and processes to ensure compliance with company, and contract and regulatory requirements
- ◆ Maintained routine client contact to meet or exceed expectations
- ◆ Conducted periodic departmental audits
- ◆ Reviewed daily, weekly, and monthly key operational metrics
- ◆ Managed location financial metrics, reported exceptions, and developed action plans to ensure the location met it financial, safety, and operational expectations
- ◆ Implemented, promoted, and adhered to company policies and procedures
- ◆ Participated in labor and employee relation activities
- ◆ Approved payroll for over 150 employees including garnishments, taxes, and relevant fare deductions on a weekly basis to ensure that all employees are paid accurately for their working hours
- ◆ Created driver picks for a fleet of 88 vehicles and 135 drivers
- ◆ Assigned drivers to dedicated schedules to eliminate all route shortages
- ◆ Communicated with vendors regularly for maintenance, safety, and operational needs
- ◆ Conducted weekly meetings with NJT officials to ensure contract requirements are being met

[REDACTED]

2007 - 2008

Transportation Service Provider for [REDACTED] Medicaid Program for the Elderly & Disabled; 50 + Employees; 2M annual revenue

General Manager

- ◆ Effectively managed customer relations through both direct contact and outreach programs
- ◆ Identified, selected, trained, and mentored staff
- ◆ Effectively and frequently communicated with staff and support team members
- ◆ Oversaw safety and training programs, plans, and processes to ensure compliance with company, contract and regulatory requirements
- ◆ Maintained client contact routinely to meet or exceed expectations
- ◆ Conducted periodic departmental audits
- ◆ Reviewed daily, weekly, and monthly key operational metrics
- ◆ Continuously managed all location financial metrics, exceptions, and action plans to ensure financial, safety, and operational expectations were met
- ◆ Implemented, promoted, and adhered to company policies and procedures
- ◆ Participated in labor and employee relations activities



- ◆ Approved payroll for 40 drivers and seven staff personnel
- ◆ Processed payroll for all employees including garnishments, taxes, and relevant fare deductions on biweekly basis to ensure that all employees were paid accurately for their working hours

2005 - 2007

Transportation Service Provider for [Redacted] Program for the Elderly & Disabled; 150 + Employees

Assistant Call Center Manager

- ◆ Responsible for the movement and direction for over 600 vehicles
- ◆ Managed, trained, and created schedules for over 40 dispatchers
- ◆ Ensured real-time updates in Trapeze system
- ◆ Monitored and documented driver performance
- ◆ Interacted with client and other provider staff to ensure high quality service delivery
- ◆ Researched and responded to high priority complaints that pertained to ADA trips
- ◆ Used Microsoft based software to do a combination of data entry and analyzing route ADA and demand response calls in a timely manner
- ◆ Communicated with GMs of different divisions and providers to ensure of smooth pullouts and appropriate route coverage
- ◆ Supervised a team that received over 4,000 calls and monitored over 6,500 ADA trips daily

2002 - 2005

Transportation Service Provider for [Redacted] Program for the Elderly & Disabled; 25 Employees

Dispatch Supervisor

- ◆ Responsible for the movement and direction for over 300 vehicles
- ◆ Managed, trained, and created schedules for 25 dispatchers
- ◆ Ensured real-time updates in Trapeze system
- ◆ Monitored and documented driver performance
- ◆ Interacted with client and other provider staff to ensure high quality service delivery
- ◆ Researched and responded to high priority complaints that pertained to ADA trips
- ◆ Used Microsoft based software to do a combination of data entry and analyzing route ADA and demand response calls in a timely manner
- ◆ Communicated with different service providers to ensure of appropriate route coverage
- ◆ Supervised a team that received over 3,000 calls and monitored over 5,000 ADA trips daily

1999 - 2002

Transportation Service Provider for the Elderly & Disabled [Redacted] 35 + Employees

Assistant Operations/ Dispatch Manager

- ◆ Monitored on-time performance, total work/pay hours, customer complaint data, and accident data
- ◆ Tracked and maintained employee attendance system
- ◆ Assisted in developing policy and procedures for dispatchers, road supervisors, and operators



- ◆ Identified safety concerns and assisted with training of dispatchers and operators
- ◆ Monitored and documented driver performance
- ◆ Provided discipline and/ or coaching for operators and staff to ensure a high level of performance and professionalism

Skills:

MS Office Suite, Outlook, Trapeze software, Adept

EDUCATION

Studied toward a Bachelor of Arts in Business Management, Prince Georges Community College

Attachment E

DC CSC CALIBRATION

Date: September 25, 2012

Location: QMCM Conference Room

Called By: [REDACTED]

Attendees:

NAME	SIGNATURE
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	
[REDACTED]	

Agenda Topics:

1. Review the Houston Call Calibration document.
2. Discuss trending and field any quality related questions.

DC CALL CENTER CALIBRATION

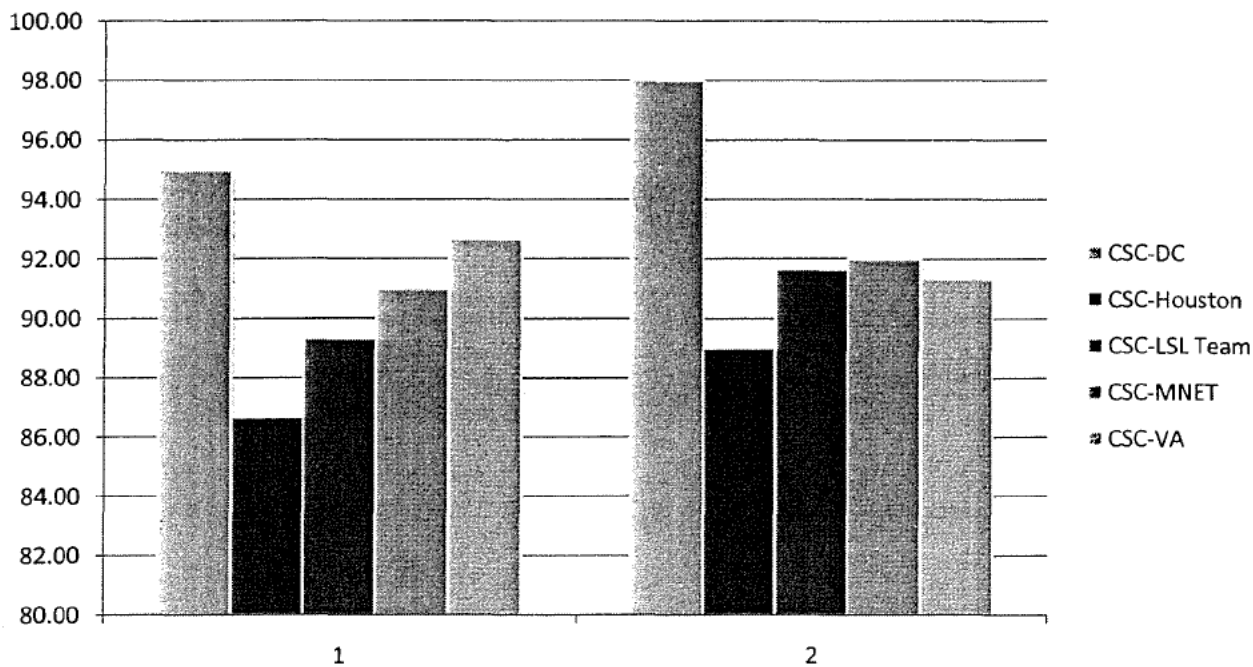
Quality Management has consistently monitored and tracked performance for each Call Center. The purpose of the Call Center Calibration is to communicate trends to Call Center Management, to identify areas in need of improvement, and to answer quality-related questions.

MTM QUALITY AVERAGES

Below, you will find a summary of MTM's overall quality averages broken down by Call Center and by Quarter. The specified Call Center is highlighted in orange.

QUARTER	CSC-DC	CSC-Houston	CSC-LSL Team	CSC-MNET	CSC-VA
1	95.00	86.67	89.33	91.00	92.67
2	98.00	89.00	91.67	92.00	91.33

OVERALL QUALITY AVERAGES PER CALL CENTER



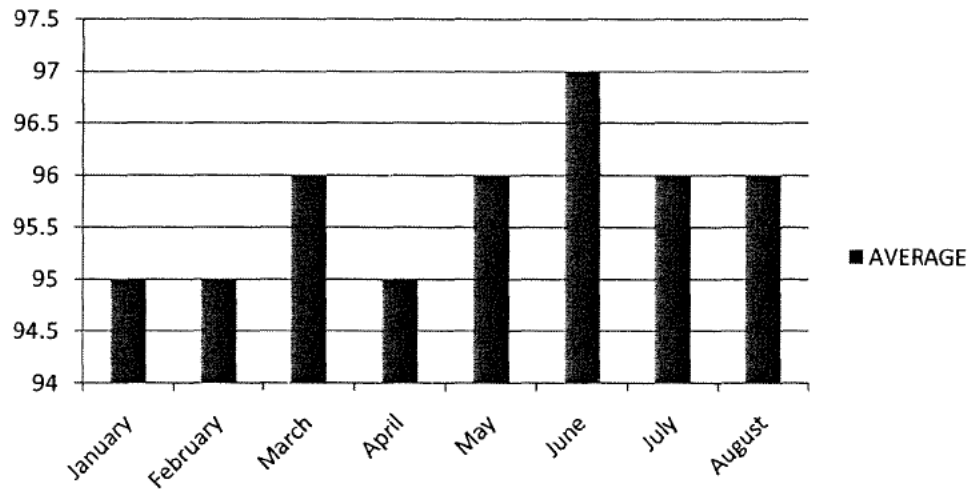
Below you will find a summary of the highlighted Call Center's performance broken down by month, quarter, evaluation questions, section, and form.

OVERALL QUALITY SCORES (YTD)

Using the information below, QM can see that since April, the DC Call Center is consistently improving their overall quality averages. QM attributes this to constantly improving Call Center coaching, effective communication between Quality and Call Center, and consistency in evaluation areas.

MONTH	AVERAGE
January	95
February	95
March	96
April	95
May	96
June	97
July	96
August	96

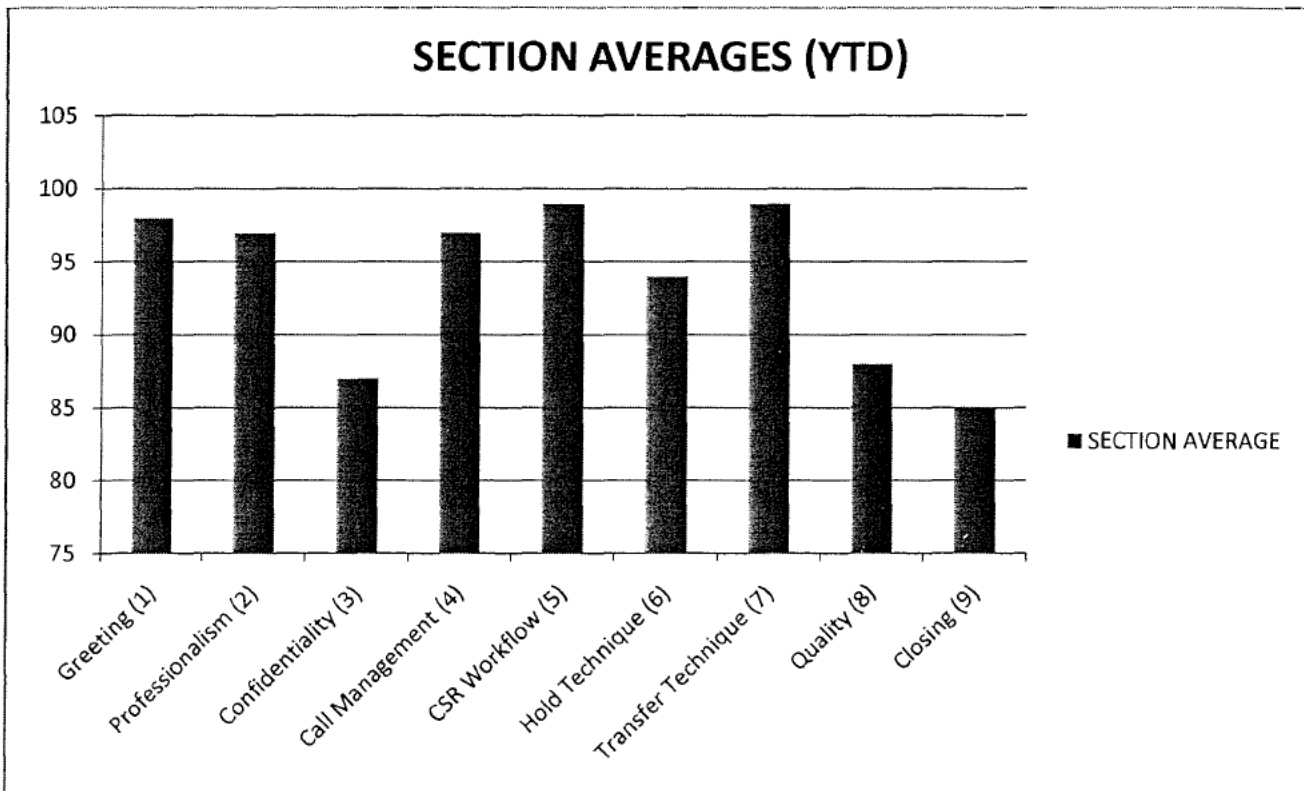
OVERALL QUALITY SCORE (YTD)



SECTION AVERAGES

Section Averages (YTD)

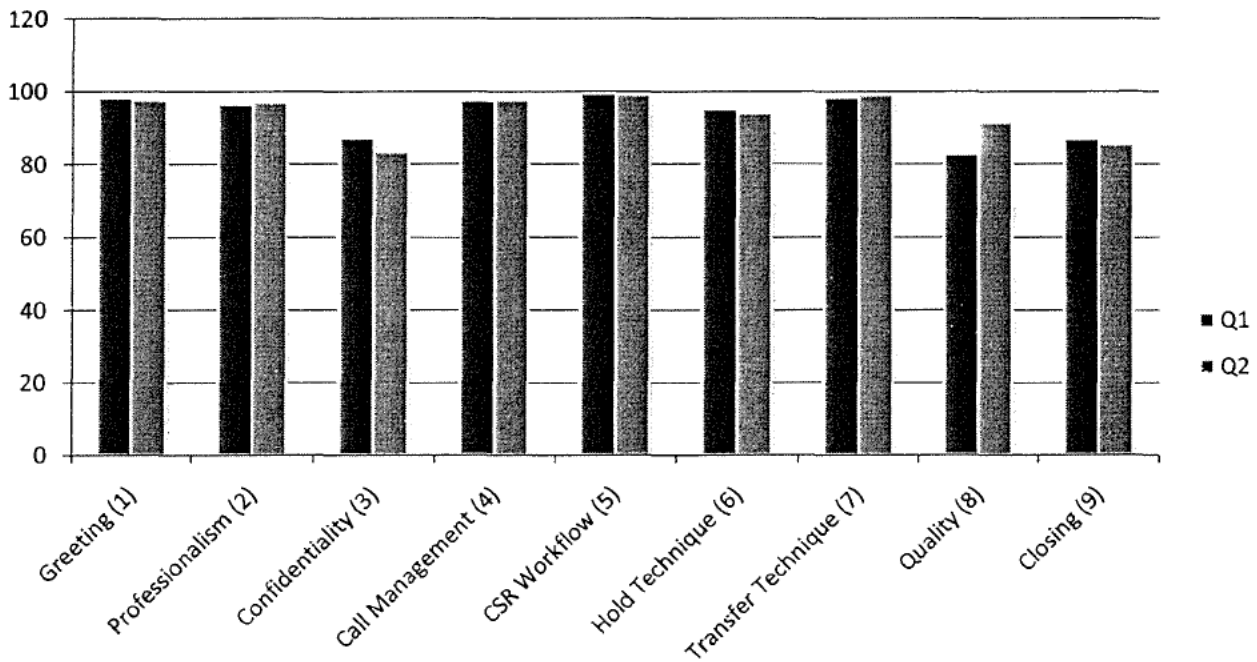
SECTION	SECTION AVERAGE
Greeting (1)	98
Professionalism (2)	97
Confidentiality (3)	87
Call Management (4)	97
CSR Workflow (5)	99
Hold Technique (6)	94
Transfer Technique (7)	99
Quality (8)	88
Closing (9)	85



Section Averages by Quarter

SECTIONS	Q1	Q2
Greeting (1)	98.04	97.49
Professionalism (2)	96.42	96.98
Confidentiality (3)	87.15	83.42
Call Management (4)	97.35	97.65
CSR Workflow (5)	99.42	98.99
Hold Technique (6)	95.16	93.97
Transfer Technique (7)	98.27	98.99
Quality (8)	82.7	91.46
Closing (9)	86.85	85.43

SECTION AVERAGES BY QUARTER



QUESTION AVERAGES BY FORM

QUESTIONS	MTM Standard
1.1 Identified self and area (Good morning/afternoon, my name is..)	98.3
1.2 CSR properly identified the company	96.44
1.3 CSR verified 3 pieces of HIPAA	99.54
2.1 Used proper grammar (no slang/jargon/company terminology)	98.61
2.2 Used caller's surname (unless directed otherwise by the caller)	92.26
2.3 Asks open ended/probing questions	99.54
3.1 Obtained caller's name/relationship/TN before disclosing info	86.82
4.1 Used open probe to start call/Asked appropriate questions	93.96
4.2 Verified TN & Address during call	97.37
4.3 Offered mileage reimbursement	97.99
4.4 Offered Bus when available	98.92
4.5 Acknowledged & answered all commitments to caller	98.92
4.6 Gave correct answers	99.07
4.7 Recapped the trip/Quantified all commitments to caller	95.82
4.8 Confirmed understanding	95.36
4.9 Problem Solving	99.23
5.1 Verified eligibility including member's demographic information	99.53
5.2 Verified provider's address	99.53
5.3 Provided information about benefits and accessing services	97.98
6.1 Requested permission & explained to place the caller on hold	95.96
6.2 Periodic time check (<3 min max or Healthplan specific)	92.7
7.1 Transferred call appropriately	98.76
8.1 Overall (tone and courtesy words)	88.24
8.2 Minimizes Distractions	88.39
9.1 Ended call properly (Thanked caller/Offered further assistance)	85.14

QUALITY AVERAGES (YTD) BY CSR

FIRST NAME	LAST NAME	MTM Standard
[REDACTED]	[REDACTED]	93.31
[REDACTED]	[REDACTED]	97.43
[REDACTED]	[REDACTED]	95.7
[REDACTED]	[REDACTED]	96.92
[REDACTED]	[REDACTED]	96.8
[REDACTED]	[REDACTED]	95.84
[REDACTED]	[REDACTED]	94.75
[REDACTED]	[REDACTED]	96.2
[REDACTED]	[REDACTED]	95.86
[REDACTED]	[REDACTED]	94.67
[REDACTED]	[REDACTED]	94.62
[REDACTED]	[REDACTED]	95.56

General Observations and Recommendations

Areas of Excellence:

- While monitoring calls, the Quality Support Coaches have noticed DC CSRs are very knowledgeable and have good problem solving skills.
- While monitoring calls, the Quality Support Coaches have noticed DC CSRs are completing fully compliant greetings on a vast majority of calls.
- When it comes to offering GMR and bus passes, CSRs in the DC CSC have no issue doing so.

Areas of Opportunity:

- While monitoring calls, the coaches noticed DC CSRs are not completing full closings (offering further assistance, questions/changes, and thank you for calling).
- The Quality Coaches have noticed CSRs failing to verify the caller's information before disclosing protected information (3.1).

Calibration notes:

Attachment F

2012 MTM Quality Management Program Annual Evaluation

XYZ Health Plan

The purpose of an Annual Evaluation of the 2011 Quality Management Program is to do an analysis of the measurable activities and processes performed throughout the year. The evaluation is a means to assess outcomes, discover areas where adjustments and improvements can be made and an overall performance measurement tool for the corporation as a whole.

Within this document, you will find results to measurable goals listed in the 2011 Quality Management Program.

Strategies

(page 4)

The following strategies are employed to achieve QMP objectives:

Oversight of Customer Service Centers

The Call Center Leadership Team has an objective of 15 scored observations per Customer Service Representative (CSR) per month.

RESULT:

The entire team of staff doing the call monitoring (Quality Support Coaches) was moved from the Call Center into the Quality Management Department in 2011. All functions related to the monitoring of calls and scoring the Customer Service Representative (CSR) staff is now under the direction of the Manager of the Quality Management Department. As the function of monitoring performance by the CSRs is purely about Quality, it was ideal to move the group under the Quality Management Department. In the Quality Management Department, the Quality Support Team has one focus and that is the quality of the performance by MTM CSRs to ensure members and Clients receive the best possible service from MTM.

The objective for 2011 was to observe fifteen (15) calls per CSR per month. Originally that objective was to be lowered in 2011 but with additional staff, the Call Center management was confident the objective of 15 calls per CSR per month could be met. While moving the Quality Support Team under the Quality Management Department has proved to be an overall good

change, the goal of reviewing 15 calls per CSR per month was not met for 2011. There were several barriers, including:

- Moving from one building to the secondary MTM building (physical location)
- Adjusting from being under the Call Center umbrella to being under the Quality Management Department umbrella
- The addition of two (2) new staff members and the replacement of another staff member within the Quality Support Team itself
- Lengthy system “glitch” with the phone system which had an impact on call recordings and the ability to retrieve calls to be monitored

Although the goal of monitoring 15 calls per CSR per month was not met in 2011, the team continues to excel in meeting the revised goal of monitoring 10 calls per CSR per month for 2012. In the 2012 QM Program, the goal was reduced to monitoring 10 calls per CSR per month and the Quality Support Team is currently averaging approximately 12-13 calls per CSR per month so far in 2012.

Method	Audit Schedule
Quality Support Coaches- compilation of scores	Customer Service Representatives- monthly

The Quality Support Coaches monitor calls on a daily basis. Information related to the performance of the CSR being scored is reported back to the Call Center leadership and management for further follow up with the CSR. The Call Center leadership is responsible for relaying information back to the CSR regarding their performance. They are also responsible for any corrective action that might come as a result of the call monitoring findings. The Call Center leadership will do coaching, re-training, discipline, etc. of the CSR in attempt to correct the problem.

In 2011, the average quality score for the CSRs handling XYZ Health Plan calls was 91%. This is up 2.5% from the 2010 score of 88.5%. Although the goal of reaching a 95% average quality score was not met, the Call Center staff are working diligently to continue to improve their quality scores so they can reach and maintain the 95% goal.

Transportation Provider Site Reviews

(page 5)

RESULT:

In 2011, seven (7) transportation providers servicing XYZ Health Plan had on-site visits from MTM Network Management staff. The majority of the transportation providers used to service XYZ Health Plan are based in Pennsylvania and are under a Letter of Agreement arrangement with MTM. These transportation providers are regulated by the Public Utility Commission (PUC) of Pennsylvania and are not governed by MTM rules and regulations because MTM has no ability to over-ride or require beyond what the PUC requires of the transportation providers. Please see brief explanation of the PUC below; it is taken directly from the Pennsylvania Public Utilities Commission website at <http://www.puc.state.pa.us/>.

The PUC regulates motor carriers that transport property, passengers or household goods as well as brokers of passenger transportation between points in Pennsylvania for compensation. Property carriers (e.g., trucking companies) and charter bus carriers (seating capacity of more than 15) are regulated for safety and insurance requirements only. Other passenger services and household goods carriers (moving companies) are regulated regarding rates, geographical area, customer service, safety and insurance. Currently, there are approximately 7,500 carriers and passenger brokers operating in Pennsylvania under the rules of and regulations of the PUC.

Transportation service companies operating within Pennsylvania are required to be licensed by the Public Utility Commission, maintain adequate insurance coverage, charge fees approved by the PUC and adhere to the commissions driver and vehicle safety regulations. Companies must also comply with certain standards regarding service set by the commission such as:

- *Providing service upon demand, regardless of the distance of the trip;*
- *Taking the shortest route to the requested destination;*
- *Charging a fare based on an approved flat rate, odometer mileage, a meter reading or in accordance with zones;*
- *Posting rates inside vehicle;*
- *Providing a receipt upon request;*
- *Ensuring passenger area and trunk are clean and sanitary;*
- *Ensuring vehicle meets all Pa. equipment and inspection standards; and*
- *Marking vehicle with the name of the company, the PUC number (PUC A-#), and a vehicle number.*
- *Ensuring meter is sealed.*

Public Utility Commission Enforcement Officers conduct vehicle inspections throughout the year to ensure they are safe and clean, drivers are properly licensed, and companies are providing reasonable service. Insurance coverage is also monitored to ensure it remains in effect. A company failing to meet the commission's driver, vehicle and service standards may be subject to fines and/or loss of its operating license.

With the PUC monitoring all those things that MTM would usually monitor regarding a transportation provider, MTM feels confident in the PUC regulating the transportation providers being utilized by MTM for XYZ Health Plan.

Method	Audit Schedule
On-site Visit	Annually or per contract

Transportation Provider Credentialing/Re-credentialing

(page 5)

RESULT:

As with the above, the PUC regulates every aspect of the transportation providers servicing XYZ Health Plan. MTM has no authority to require anything above and beyond what is required by the PUC. MTM feels confident in the PUC regulating the transportation providers being utilized by MTM for XYZ Health Plan. With this being said, MTM did, however, meet with seven (7) transportation providers that service XYZ Health Plan in 2011.

Method	Audit Schedule
Recredentialing	Annually or per contract

External Fraud & Abuse Review

(page 6)

RESULT:

As with the above, the PUC regulates every aspect of the transportation providers servicing XYZ Health Plan. MTM has no authority to require anything above and beyond what is required by the PUC. MTM feels confident in the PUC regulating the transportation providers being utilized by MTM for XYZ Health Plan.

Method	Schedule
Trip record review for provider leaving network	30 days
Fraud Alert	Immediately or as otherwise directed/requested
Initial Trip record review	30 days after provider signs CAP
Follow up and CAP Closure trip record review	Two weeks following end of 30 day CAP to ensure continued compliance with improvements made during CAP

Medical Appointment Member/Recipient Attendance Verification

(page 7)

RESULT:

The process for attendance verification changed significantly during 2011. MTM no longer faxes forms to facilities requiring them to verify attendance of the members. It was a very cumbersome process and received little feedback and often times the feedback MTM did receive was incorrect and/or haphazardly put together by the facility. MTM continues the 100% attendance verification process for mileage reimbursement trips and urgent trip requests.

Method	Audit Schedule
Medical appointment attendance verifications	Daily

Member/Recipient Fraud Alert Audits/Investigations

(page 7)

RESULT:

In 2011, MTM investigated fourteen (14) incidents of potential fraud. These were reported to XYZ Health Plan during the month they occurred. The idea of there being only 14 incidents of potential fraud for the entire 2011 year is a relatively small number compared to what MTM experiences with other membership populations.

Method	Audit Schedule
Trip record review	Daily

Internal Audits

(page 8)

RESULT:

The Quality Management Department is responsible for doing internal audits on all departments and all satellite offices held by MTM. The types of audits may vary and which departments are audited may vary based on several factors but there is one item in particular that doesn't change from year to year. Quality Management does a HIPAA audit of each department and each of the MTM satellite offices. In 2011, each department within MTM and each satellite office was audited and all received satisfactory results and there were no need for any Corrective Action (CAP) or Performance Improvement Plan (PIP). Each department within MTM does their own audits of their processes for effectiveness and the results will either validate the need to continue with the audit on an ongoing basis or it will provide evidence as to why the audit does not need to continue moving forward.

Method	Audit Schedule
Internal Site Audits	Annually or semi – annually (if department fails audit)

HIPAA & Fraud, Waste, & Abuse (FWA) & Cultural Competency Training

(page 9)

RESULT:

In 2011, MTM added Cultural Competency and Code of Conduct to the formal training requirements. All staff members received training in 2011. Each MTM staff member has an electronic file held in the Human Resources (HR). It is within this file where the individual's documentation of the training they have completed is located. With several hundred employees, it's more efficient to store information this way and to provide an Attestation for the training verification when asked.

Newly hired staff takes all of the training programs MTM utilizes when they go through orientation. All staff renews things like HIPAA, FWA, Cultural Competency and Code of Conduct annually, along with other selected training courses determined by management. MTM also makes our training models available to our downstream entities.

Method	Schedule
Education, testing, and signing confidentiality statements	Orientation – all new MTM employees
HIPAA, FWA & Cultural Competency Retraining	Annually or more often if significant updates are mandated
Continuing Education	As needed

Satisfaction Surveys

(page 9)

Member/Recipient Satisfaction Surveys

RESULT:

The overall percentage of approval from the members was 96.33%

Method	Audit Schedule
Random telephone surveys	Monthly

Transportation Provider Satisfaction Survey

(page 10)

RESULT:

When it comes to the transportation provider satisfaction surveys, MTM's goal is to have a response rate of 30% or better. In 2011 the response rate was 41.9%. The overall satisfaction with MTM was a bit below the goal of having an 80% satisfaction rate. The satisfaction rate from the transportation providers came in at 79.74%, just a small step away from meeting the goal rate of 80%.

Method	Audit Schedule
Mass mailing	Annually

Client Satisfaction Surveys

(page 10)

RESULT:

When it comes to Client satisfaction surveys, MTM's goal is to have a response rate of 50% or better. In 2011 the response rate was a strong 59.5%. The overall satisfaction with MTM was 97.8%, exceeding MTM's goal of reaching a 95% satisfaction rate with the Clients. Validation from

the Clients makes the hard work even more rewarding. MTM strives to do everything possible to keep the Clients happy and content with MTM and the value MTM brings to their members.

Method	Audit Schedule
Mass mailing	Annually

Medical Facility Satisfaction Survey

(page 10)

RESULT:

When it comes to facility verification surveys, MTM’s goal is to have a response rate of 40% or better. In 2011 the response rate was a strong 53.7%. The overall satisfaction with MTM was 85.6%, landing slightly above our goal rate of 85%. These results prove that MTM’s continued efforts to work closely with facilities to improve the overall experience their patients using NEMT transportation have with MTM. MTM wants to patients to get the treatment they need and the facility to have to extend the least amount of effort arranging the transportation. In this category, MTM meet the goal for 2011.

Method	Audit Schedule
Mass mailing	Annually

Complaints/Grievance Management

(page 11)

RESULT:

In 2011 there were a total of 186 complaints registered under XYZ Health Plan. Through investigation, 22 of those complaints were deemed to be unsubstantiated, resulting in a grand total of 164 complaints for the entire year of 2011. Considering there were 39,056 trips legs in 2011 and only 164 complaints, the overall complaint ratio for XYZ Health Plan for 2011 was a mere .42%; not even ½ of a percentage point.

Based on contractual obligations, complaints are to be resolved within 24 hours. Overall, 86.10% of the complaints were resolved within the required timeframe. This is up 13.10% from 2010 so it is moving in the right direction. MTM takes the transportation provider’s response time to complaints very seriously and have begun serving consequences to those transportation providers that don’t live up to their obligation of resolving a complaint within the allotted timeframe.



Transportation providers can face liquidated damages, suspension or even termination if the problem with responding to complaints in a timely fashion isn't corrected. MTM continues to work on getting this percentage to keep moving higher and higher.

Service Denials

(page 13)

RESULT:

In 2011 there were a total of 773 trips denied by MTM based on XYZ Health Plan protocols. The 773 is the total for the year, however, that averages out to roughly 15 denials per week or 64 on average per month.

Year = 773

Month = 64 (average)

Week = 15 (average)

Incident/Accident Reports

(page 16)

RESULT:

In 2011 there were only 3 reported accidents/incidents and none of those was of a truly serious nature where lives could have been in jeopardy.

Method	Audit Schedule
Incident/Accident Reports	Per MTM policy and based on client contract requirements

Quality Improvement Program (QIP)

(page 22)

In 2011 there were two (2) QIPs taking place.

The first is a two year project and the topic is *Improving Transportation Provider Satisfaction*. MTM greatly values the relationships that have formed with the transportation providers so it became important to find what the issues were and to address them with a solid effort. The first year of this QIP proved to be beneficial as the transportation provider satisfaction with MTM went from

73.8% in 2010 up to 79.74% in 2011. That is an improvement of almost 6% and the project has only completed one of its two years.

The second QIP is a one year project and the topic is *Improving Customer Service Quality*. Although this was a one year QIP, this topic is really being worked on at all times. MTM staff wants the very best for the members or the people calling in on their behalf.

Indicators of Care and Service

(pages 23, 24 & 25)

Quality Management

#	INDICATOR	GOAL	REPORT FREQUENCY
001	Complaint Rate	2.0% or less. Complaint rate for XYZ Health Plan in 2011 was .42%	Monthly
002	Resolution Rate	92% of all complaints will be resolved per client contract timeframes. The average monthly resolution timeframe for XYZ Health Plan for 2011 was 83.6%, not meeting the goal, however, the resolution average continues to go up in 2012	Based on request
003	Compliance Audit Rates	90% of Compliance Audits will indicate 85% or better compliance. Most end up with at least a 90% compliance rate or they can be placed on a Performance Improvement Plan (PIP) to correct the problem. HIPAA compliance as an example from 2011 > the MTM offices combined had a 98% compliance rate for HIPAA compliance	Monthly
004	Complaints by Reason Code	Tracking and trending delivered to client per contract specifications. This report is delivered to XYZ Health Plan on a monthly basis	Monthly
005	Risk Management	Tracking by type, transportation provider, and client. Risk Management is not a standard process but it is mainly used when something of a more serious nature has occurred and things within the investigation need to be traced down to the owner	Quarterly

MTM 2011 Quality Management Program
Annual Evaluation – XYZ Health Plan
MTM Proprietary Document
4/2012

#	INDICATOR	GOAL	REPORT FREQUENCY
006	HIPAA Disclosure	90% compliance with HIPAA Disclosure Policy. Better than 90% compliance	Quarterly
007	Member/Recipient Satisfaction Survey	95% satisfaction with Customer Service Center performance. Member's satisfaction with Call Center staff for 2011 was 96.48%, exceeding the goal	Monthly
008	Member/Recipient Survey Results- Overall Satisfaction	92% satisfaction with network transportation provider performance. Member's satisfaction with the experience overall was 96.27%	Monthly

Network Management

#	INDICATOR	GOAL	REPORT FREQUENCY
001	Transportation Provider Non-Compliance	5% or less transportation providers are closed for non-compliance. None are closed for non-compliance	Monthly
002	Transportation Provider Satisfaction	80% or better transportation providers' satisfaction, 30% survey return rate. The return rate was 41.9% and the overall satisfaction rate was 79.74%, just below the goal rate of 80%	Annually
003	Transportation Provider Complaint	2% or less complaint rate. The overall complaint rate was .42%	Monthly
004	Transportation Provider No-Show	2% or less no-show rate. The no show rate was .18%	Monthly
005	Transportation Provider Cancellation	2% or less cancellation rate. The cancellation rate was 3.64% - far exceeding the goal	Monthly
006	Transportation Provider On time Performance	90% of transportation providers are on-time. Well over 90% of transportation providers are on time, only .00072% were reported as being late	Quarterly

Customer Service

#	INDICATOR	GOAL	REPORT FREQUENCY
001	Abandon Rate	The monthly average for abandonment is 5% or less for all Customer Service Centers.	Monthly

#	INDICATOR	GOAL	REPORT FREQUENCY
		The overall abandon rate for XYZ Health Plan in 2011 was 3.11%, easily meeting the goal	
002	Speed to Answer	The monthly average for answering the call by a non-recorded voice is within 30 seconds. The average call for XYZ Health Plan is answered within 17 seconds, easily meeting the goal	Monthly
003	Operator Errors	2% or less. Less than 2% have operator errors	Monthly
004	Customer Service Center Audits	95% or better average on CSR performance evaluation CSR performance for XYZ Health Plan was 91% in 2011 and although this number is up 2.5% from 2010, there is more work to be done by the Call Center staff to bring this number up and into compliance with the goals	Quarterly

Care Management

#	INDICATOR	GOAL	REPORT FREQUENCY
001	RTP verification of eligibility, closest, and most cost effective transportation provider	90% accuracy of RTP documentation. 100% documentation takes place	Monthly
002	Consistency in mode of transport determination (LON's)	90% accuracy of LON documentation. 100% documentation takes place	Monthly

Client Services

#	INDICATOR	GOAL	REPORT FREQUENCY
001	Member/Recipient No Show	5% or less. Member no shows account for 1.61% of the overall trips for 2011	Monthly
002	Client Satisfaction	95% Excellent or Good. The overall satisfaction rate with Clients was 97.8% in 2011	Annually

[REDACTED]

From: [REDACTED] [REDACTED]@mtm-inc.net]
Sent: Thursday, October 04, 2012 3:39 PM
To: [REDACTED]
Cc: [REDACTED]
Subject: Re: RFP CQ12169/KAM, Questions and Clarifications for Quality Assurance (QA) Proposal

[REDACTED] - I have received your questions and we will begin responding to them. We look forward to the opportunity to work with WMATA.

Thank you,

[REDACTED]

On Oct 4, 2012, at 11:38 AM, "[REDACTED] [REDACTED]@wmata.com<mailto:[REDACTED]@wmata.com]>" wrote:

Good Afternoon [REDACTED],

WMATA is in the process of evaluating the proposal your company submitted in response to RFP CQ12169/KAM for QA. Attached are Questions and Clarifications for your company.

A response is required to my attention no later than 4:00 P.M. Wednesday, October 10, 2012 EST.

<MTM Questions and Clarifications 10-4-12.pdf> Medical Transportation Management, Inc. (MTM) Helping People Access Healthcare through Quality Transportation Management This communication contains information that is confidential and is solely for the use of the intended recipient. It may contain information that is privileged and exempt from disclosure under applicable law. If you are not the intended recipient of this communication, please be advised that any disclosure, copying, distribution or unauthorized use of this communication is strictly prohibited. Please also notify MTM at 1-888-561-8747 and return the communication to the originating address.

[REDACTED]

From: [REDACTED]
Sent: Thursday, October 04, 2012 2:40 PM
To: [REDACTED]@mtm-inc.net
Cc: [REDACTED]
Subject: RFP CQ12169/KAM, Questions and Clarifications for Quality Assurance (QA) Proposal
Attachments: MTM Questions and Clarifications 10-4-12.pdf

Good Afternoon [REDACTED],

WMATA is in the process of evaluating the proposal your company submitted in response to RFP CQ12169/KAM for QA. Attached are Questions and Clarifications for your company.

A response is required to my attention no later than 4:00 P.M. Wednesday, October 10, 2012 EST. ~~EST~~ EDT

Question #	Section/Page	Clarification
1	Past Performance page 4	Please describe in detail how MTM's past experience has prepared it to successfully take on quality assurance tasks of the size and scope as those associated with MetroAccess, including the in-depth and highly analytical review of operational data of other independent contractors. Please describe the "lessons learned" in other contracts that will directly benefit WMATA. As a QA contractor, MTM will be responsible for developing a number of detailed reports specific to MetroAccess. Please provide sample operational data reports developed for other MTM clients. Provide detailed information including timeframes for reducing your overall complaint rate and increase in client satisfaction with your firm's services. Finally, please explain your 100% trip reconciliation process.
2	Past Performance page 4	What is MTM's historical employee turnover rate by contract, by year and by staff position for all similar contracts?
3	Page 19	MTM has indicated that they wish to propose a new customer No Show suspension penalty process. Please explain how this will provide greater benefit to MetroAccess than the current suspension process as described in the RFP.
4	Page 20	MTM has indicated that QA Representatives may impose corrective action on customers or contractors. Please describe how MTM would determine their appropriate application and how such corrective actions would be levied. Also, please elaborate on whether this process is intended to complement the performance incentives and/or liquidated damages stated in the RFP or replace them. If the intent is to replace the stated performance incentives and/or liquidated damages, please elaborate on why you consider the proposed corrective actions more likely to achieve better performance by the OCC and Service Delivery contractors.
5	Page 21	MTM states that QA Representatives will offer "reliable and reasonable assistance at all times". Does MTM propose to have complaint management staff available 24/7? If so, please describe staffing levels in detail.
6	N/A	Please describe, in detail, MTM's proposed incident management and review processes and procedures. Incident is defined as including, but not limited to, collisions, injuries, altercations, illness requiring EMS transport, and any events the FTA defines as being NTD reportable.
7	Page 24 & Page 50	What methods/techniques/statistical analyses will be used to review, evaluate, and report on performance data, including reconciliation process review with respect to WMATA performance standards resulting in incentives and/or liquidated damages being paid or assessed? Please clarify the sampling methodology you would use to ensure the validity of the data.
8	Page 24 & Page 50	Considering the massive amount of data captured by Trapeze and by field monitoring, which operational data will be reviewed and how? What data points will be examined and how? How will appropriate sample sizes be determined? What frequency does MTM propose on which the reviews will be performed? What staff position(s) will be assigned to each review?
9	Page 28	MTM proposes the same total number of staff as was noted in the RFP as currently performing QA functions along with other duties outside the QA function. Please detail the benefit to WMATA of the proposed QA staffing plan. Please include the skill sets you feel are needed to perform the various Quality Assurance positions proposed. How will your firm

		ensure the competency of staff during the entire contract period? Please provide additional detail concerning executive oversight of the project team.
10	Page 43	Who will maintain MTM's fleet? What are their qualifications?
11	Page 45	WMATA has at times been unsatisfied with Spider due to the tool's performance and the responsiveness of its developer. Please explain how WMATA will not encounter the same difficulties with Transit Miner. Also, please describe how Transit Miner will be integrated with the applications identified in Part III, Section 5.4 of the RFP, and will provide better data access and reporting capabilities than Spider. Compare and contrast as necessary with Spider software. In addition, please describe how the Transit Miner data will be reconciled with data reported by the OCC and Service Delivery contractors.
12	Page 46	WMATA requires extensive documentation and document retention. Please provide further detail for how the scanning of hard copy documents will be accomplished. Please describe your proposed filing system, and describe the method by which WMATA staff might recall specific documentation when needed.
13	Attachment D	It appears as though MTM has not scheduled its transition-in to be complete until September 2, 2013. Please explain how MTM will provide all required QA services no later than the contract start date of July 1, 2013. Please provide a detailed explanation of the differences expected in the QA role as opposed to your previous operations start-ups.
14	Attachment A	Please describe how this hardcopy form is translated into reportable, electronic data.
15	Attachment B	Please describe how this hardcopy form is translated into reportable, electronic data.
16	Attachment C, James Sackor	Please describe how this candidate meets the requirements set forth for the General Manager position in the RFP.
17	Attachment C, Janet Marcec	Please describe how this candidate meets the requirements for the Quality Assurance Manager position set forth in the RFP. Please provide additional detail regarding the analytical skills of this candidate.
18	Page 20	Your proposed process for investigating complaints is to "contact the applicable contractor(s) to obtain their view of the complaint." Please describe in detail how you would use only the tools in Trapeze to perform an independent investigation.
19	Throughout	During the review of your firm's proposal, WMATA noticed grammatical and typographical errors. Please detail the process you would follow to ensure that reports and other documents prepared for WMATA as part of the Quality Assurance services would not contain the same types of issues.
20	Page 10	Please clarify, in detail, how you will monitor OCC activities and what will be reported to WMATA.
21	Page 16 & Page 18	Please clarify, in detail, how you will monitor "Where is my ride?" calls. Describe how the Trapeze Tracker Action Log will be used to identify data trends that would indicate a need for further investigation, process improvement, or retraining.
22	Page 21 & Page 26	Provide your methodology and sampling strategy, including frequency, for reviewing Service Delivery Contractor performance. Include details on how the proposed "On-Street Monitoring" program will complement the road supervision responsibilities of the Service Delivery contractor(s). Also, describe how you are planning to access and use driving records of Service Delivery personnel during the on-street monitoring. Please include details

		of how you would ensure data integrity that would impact the accuracy of analyses and reporting.
23	Page 50	Please describe in detail the level of analysis you intend to perform, including trend analysis and resulting recommendations for timely and actionable corrective actions.
24	Page 4 & Page 57	Please explain, in detail, your understanding of how MetroAccess' QA needs are currently being met and how you will meet the requirements of the QA model presented in the RFP.
25	N/A	Please provide a detailed plan for timely review of invoices submitted by other contractors, including those steps taken to ensure the accuracy and completeness of the invoices.
26	N/A	There are a number of monthly public meetings and outreach events that occur after regular business hours. Customer feedback at these public meetings includes customer feedback on MetroAccess service, commendations, and complaints that require on-the-spot comment and follow-up investigation and response to customers. Please indicate how these meetings will be staffed, how your staff attending these events will be trained, and how your firm's participation will be coordinated with MetroAccess management.
27	Page 21	Please elaborate on how the proposed in-person monitoring of OCC staff will ensure contractor compliance with WMATA standards and performance expectations.