Mecklenburg County Non-Emergency Medical Transportation (NEMT)

BUSINESS DIVERSITY & INCLUSION PROGRAM

OED.MECKNC.GOV/BDI
Mecklenburg County Non-Emergency Medical Transportation

704-336-3000
Mecklenburg County Non-Emergency Medical Transportation

Office of Economic Development

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Business Diversity & Inclusion Program

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Mecklenburg County
Non-Emergency Medical Transportation

OUTREACH GOALS

• Learn about current and upcoming project opportunities
• Hear tips about how to operate under COVID-19 safety guidance
• Learn about Mecklenburg County's BDI Program
• Encourage and increase MWBE participation
• Explain vendor registration process
• Answer questions
HEALTH & SAFETY PRECAUTIONS TO MITIGATE RISK OF NOVEL CORONAVIRUS

All State of NC and Mecklenburg County instructions related to COVID-19 are to be followed:

• As the State of North Carolina lifts restrictions on social distancing, most capacity limits, and masking indoors (except in specific settings), and the CDC releases guidance for fully vaccinated individuals, Mecklenburg County Public Health has recommendations specific to COVID-19 safety in the Mecklenburg community.

• Everyone 12 years of age and older should get vaccinated.

• Unvaccinated individuals should remain masked in public, especially when indoors, continue to social distance and avoid large crowds.

• Everyone needs to mask in high-risk situations, like crowded spaces, childcare and schools, camps, long term care facilities, health care settings, detention facilities, shelters, etc.

Specific to the bid process:

• Guidelines are currently changing, please review the bid documents for up-to-date information.

Mecklenburg County Resource to Current Instructions:
https://www.mecknc.gov/COVID-19/Pages/Home.aspx
Poll Questions

You will be prompted to respond to a poll question. We will give about 1-minute to submit your responses.

1. Are you licensed and insured?
   o Yes
   o No

2. How many vehicles do you have in your fleet?
   o 1 - 3
   o 3 - 5
   o 5 - 8
   o 8 - 10
   o 10+

3. What is your favorite ice cream flavor?
   o Strawberry
   o Cookies n Cream
   o Chocolate
   o Vanilla
   o Rocky Road
   o I like any kind of ice cream
   o None of the above
   o I don’t like ice cream

If you have questions in relation to the project, please add them to the chat box or raise your hand so that we can open your microphone...
Mecklenburg County
Non-Emergency Medical Transportation
Mecklenburg County
Non-Emergency Medical Transportation
(Insurance Requirements)

Commercial General Liability:

**Minimum** $1,000,000 per occurrence and aggregate, including coverage for:

- Bodily injury
- Property damage
- Products and completed operations
- Personal/Advertising injury liability
- Contractual liability

Mecklenburg County must be listed as additionally insured for services rendered under the Contract
Mecklenburg County
Non-Emergency Medical Transportation
(Insurance Requirements)

Automobile Liability

**Minimum** $1,000,000 per occurrence combined single limit each occurrence for:

- Bodily injury
- Property damage liability covering all owned, non-owned, and hired vehicles

Worker Compensation – Employer’s Liability:

- $100,000 per accident limit
- $500,000 disease per policy limit
- $100,000 disease each employee limit

If less than 3 employees, including owner, a signed statement on business letterhead may be submitted.
Mecklenburg County
Non-Emergency Medical Transportation
(Insurance Requirements)

Certificate of Insurance

• Standard Accord form
• Coverage must include beginning and ending date
• Limits of Coverage

Certificate Holder Section Should Read:
Mecklenburg County
700 East 4th Street
Charlotte, NC 28202
Mecklenburg County Non-Emergency Medical Transportation
(Project Overview/Qualifications)

**Project Overview:**

Mecklenburg County, through its Department of Social Services (DSS) Mecklenburg Transportation System (MTS) located in the state of North Carolina will be seeking transportation vendors to provide non-emergency medical transportation services.

Current DSS Transportation vendors will continue providing services under the existing contract expires on June 30, 2022.

**Vendor Qualifications:**

Vendors must have a minimum of three (3) years successful history of providing transportation services.
Mecklenburg County
Non-Emergency Medical Transportation (Rates)

Ambulatory Local Travel:
- $2.16 per mile
- Attendants and minors authorized by DSS will be transported at no charge

Non-Ambulatory Local Travel:
- $31.00 per passenger

Ambulatory and Non-Ambulatory Out-of-County Travel
- $2.16 per mile from origin to destination.
- Carpool stipulations may apply.
- $15.00 per hour waiting time
Deliverables

**Vehicles/Fleet**

Vehicles must be furnished to ensure efficient and adequate service to DSS passengers. Vehicles shall be compliant with specifications outlined in the Americans with Disabilities Act.

**Employees – Drivers/Subcontractors**

Employees or subcontracted drivers must have a valid and appropriate North Carolina or South Carolina driver’s license and a safe driving record with no DUI/DWI on record in the past ten (10) years.
Deliverables

Non-emergency Transportation Service

The maximum one-way ride time for any passenger shall not exceed sixty (60) minutes from the time the passenger boards or enters the vehicle, except as required due to distance for Out of County travel.

Service is door to door.

Some customers will require physical assistance from their door and to the door of their destination.

Passengers can be any age. Minors will have an adult caretaker with them during transport. Adults who need a caretaker will also have a caretaker ride with them.
Deliverables

Communication

A point of contract must be identified and be available at any time, including nights, weekends, and holidays.

Record Keeping

Maintain electronic records to document that indicate service has been provided.
Poll Questions

You will be prompted to respond to a poll question. We will give about 1-minute to submit your responses.

1. Does your service offer weekend transportation/trips?
   - Yes
   - No

2. How many drivers do you have in your company?
   - 1 - 3
   - 3 - 5
   - 5 - 8
   - 8 - 10
   - 10+

3. Does your service offer non-ambulatory transportation?
   - Yes
   - No
Vendor Management Program Office
980-314-2400 | Vendor.Management@MeckNC.Gov
Register via e-Vendor Portal: www.MeckPROCURE.COM (Use Firefox or Internet Explorer)

What will be needed to submit your vendor registration
• Active business status in with the secretary of state
  o Including nonprofit and sole proprietor
• Address
• Business name and DBA (if applicable)
• Business Tax ID Number (EIN/TIN)
• Legal Business Banking Information
• Contact Information
• Descriptions of your products and services
  o For example, NIGP commodity codes

2021 VENDOR REGISTRATION AND SOLICITATION TRAINING SCHEDULE
2nd and 4th Wednesday of each month
For more information, click here
Register via e-Vendor Portal:
https://vendor.ncgouv.com/vendor/login

Where to find Solicitations

NC State-Wide Opportunities Interactive Purchasing System (NCIPS)  https://www.ips.state.nc.us

[ex: Search Bids by Department – County of Mecklenburg]
Increase Participation of Minority and Women Businesses in Mecklenburg County Business Opportunities Through Outreach, Training, and Partnerships

The Program assists businesses through various support efforts:

- Outreach Events and Networking
- Support and Navigation through MWBE Certifications, Vendor Registrations, and Doing Business with Mecklenburg County
- Informationals for Purchasing, Procurement, Bidding, and Contracting
- Advocacy and Mediation
- Capacity Building/Supportive Services
  - One-on-one /Group Sessions
  - Trainings and Workshops
  - Information, Referrals, and Resource Sharing
- Vendor/Supplier Diversity
- Project/Program Compliance and Monitoring
Benefits of Certifications

Mecklenburg County does not certify. The County assists with navigation for the following certifications...

- Increased visibility and business exposure
- Access to working capital loan resources
- Award Recognition and Celebration opportunities
- Participate in programs focused on MWBEs
- Free workshops, seminars, and training programs
- Networking events and opportunities
- Access to Mentorship/Protégé programs
- Notification and access to contracting and subcontracting opportunities
- Listed in public vendor/supplier databases
- Access to supportive services with diversity professionals

The business must be 51% owned and operated by a minority, woman, or small business owner

**Historically Underutilized Businesses (HUB) Certification**
North Carolina Department of Administration
HUB Office
(Reciprocity if applicable)

**Disadvantage Business Enterprise (DBE) Certification**
North Carolina Department of Transportation
Department of Civil Rights
(Reciprocity/Inter-state if applicable)

**Small Business Enterprise (SBE) Certification**
City of Charlotte
Charlotte Business Inclusion (CBI) Program
(MWBE Relevant Market Certificate, if applicable)
Certification Checklist

NC HUB
N.C. DEPARTMENT OF ADMINISTRATION
OFFICE FOR FEDERALLY UNDERTAKEN BUSINESS
1330 Mail Service Center, Raleigh, NC 27619-1038 • (919) 733-2350 • Fax: (919) 733-2355
Website: www.nc.gov/nchub • Email Address: hubofficemailing@nc.gov

DOCUMENTATION REQUIRED

Based upon your company’s business structure (e.g., as a proprietorship, corporation), you are required to submit the following documents to the HUB Office within 30 days of your request for certification. Failure to submit the required documents within the specified time will result in administrative action. Notice must be addressed to the correct office.

Planning document:

☑ Statewide Uniform Certification Application. Application must be signed and dated
☑ Work experience references for all owners. Include proof of ownership/employment with corresponding data
☑ Current Copy of recording or Remarriage Report (Birth Certificates, Marital Certificates, Divorce Certificates, Military ID, or Driver’s License if all must be up to date)
☑ Proof of ethnicity, based upon the racial groups identified in N.C.G.S. § 143C-138.4(b) Black, Hispanic, American Indian, or Asian American. Provide a copy of your Passport, Green Card, Birth Certificate or complete a signed and notarized Ethnicity Affidavit
☑ Copies of Professional Licenses, if required
☑ Schedule of Services provided to all clients, managers, owners, or directors of the firm (W-2, QuickBooks, or statement on company letterhead or email, if possible)
☑ Copies of legal forms for office and storage or a statement identifying location of business operation
☑ List of equipment (lease or owned) along with signed lease agreements, title proof of ownership of equipment needed to operate your business
☑ Documented proof of contributions made to acquire ownership of each owner
☑ Statement from your bank listing names of all persons who have signature authority on your business bank account
☑ Two business letters of reference (with your firm’s work for evidence—include contact information)
☑ Home state minority and/or disadvantaged business certification for out of state businesses
☑ Corporate good standing, if applicable

Corporations must provide the following additional information:
☑ Official Articles of Incorporation (signed by CFO/CEO)
☑ Born/existed at all Corporate stock or Corporation and Transfer Agent
☑ Assumed Name Certificate, if applicable
☑ Shareholders Agreement
☑ Declaration of Power of Attorney

LIMITED LIABILITY COMPANIES, including LLC and Limited Partnerships
☑ Declaration of these firms
☑ Corporate Bylaws and any amendments

Partnerships, Limited Partnerships, and Limited Liability Companies should provide:
☑ Articles of Organization (LLC)
☑ Operating Agreement (LLC)

Further, if you have any questions about your business, please provide:

☑ Partnership Agreement
☑ Corporate must also provide

☑ Corporate Agreement

CBI-SBE

Complete This Checklist to Ensure All Required Documents Are Included

Thank you for your interest in becoming a certified SBE with the City of Charlotte. Please review the checklist below and use it as a guide to complete your application and organize the appropriate submission documents. Please make sure to include all supplemental documentation (as applicable) with your application. Failure to submit a complete and accurate application could result in your application being returned to you with no action taken. Please mail or deliver a complete application with required documents to the address on the front of this packet. Faxed applications will not be accepted. If you need assistance with this list please give us a call at 704-335-4137.

SUBMITTING DOCUMENTS TO CBI

☑ Copies of Director or Trustee License
☑ Work experience requirements that include places of employment and corresponding dates
☑ Personal Net Worth (PWN): The applicant’s equity must provide a personal net worth statement (see PWN template attached) to verify that the net worth exceeds the EEOC’s personal net worth limitation
☑ Proof of ownership or personal residence (Birth Certificate, passport, voter registration card, work visa, green card or military ID)
☑ Signed lease for the operation space. If you operate from home please submit a statement indicating that you operate your business from your home residence. Example: Statement of business operation from home address, sign and date
☑ List of Equipment (lease or owned) or title/proof of ownership of equipment needed to operate your business. In a separate sheet of paper please indicate all equipment you use to operate your business. Example: Types of equipment, quantity, cost, etc.
☑ Taxes paid for the past 3 years (less than 3 years old). If no taxes have been filed, a current balance sheet is acceptable
☑ List all projects, current in progress, or performed in the past three (3) years, including any contracts with the City of Charlotte naming participation by key staff members in each project
☑ Submit copies of all licenses and/or professional designations/certifications where applicable (for a list of professions, visit http://www.nccommerce.com/certi/state/certi/verify/licAndProf/index.html)

SUBMIT ADDITIONAL INFORMATION ACCORDING TO YOUR BUSINESS STRUCTURE

☑ SOLE PROPRIETORSHIP
☑ Professional or Trade License

PARTNERSHIP/JOINT VENTURE (INCORPORATING L.L.C./L.P.)
☐ Copy of Partnership or Joint Venture Agreement
☐ Professional or Trade License

CORPORATION (LLC INCLUDING P.L.L.C. AND PLLC)
☐ Official Articles of Incorporation (signed by state official)
☐ Birth/taols of all Corporate stock certificates and stock
☐ Transfer Agent
☐ Shareholders Agreement
☐ minutes of all shareholder and Board of Directors meetings
☐ Corporate by laws and any amendments

NC DOT-DBE

UNIFORM CERTIFICATION APPLICATION SUPPORTING DOCUMENTS CHECKLIST

To order to complete your applications for SBE or DBE certification, you must complete a copy of all of the following required documents. A failure to supply any information requested by the DOT may result in your first hearing.

Required Documents for All Applicants
☑ Certification Agreement (includes UserModel and Bylaw)
☑ DBE Affidavit (includes places of employment with corresponding dates, all officers, board of directors and a balance sheet)
☑ DBE Certification Agreement
☑ Corporate by-laws and any amendments
☑ Corporate financial statements and bank records
☑ Certified Declaration of Organization and Operating Agreement with any amendments (the LCC)

Optional Documents to be Provided at Request
☑ TIF statementnaires applicable may require the submission of the following documents: (Preparation of TIF statementnaires is the responsibility of the applicant and must be supplied to the DOT by the applicant or at the request of the DOT)
☑ Proof of citizenship
☑ Waiver of liability for each branch office or agent of your firm
☑ Audited financial statement (attestable)
☑ Personal Financial Statement (for the past 3 years, of applicant, the other disadvantaged owners of the firm)
☑ Trust agreements held by any owner claiming disadvantaged status
☑ Statement of non-disclosure and non-disclosure agreement for the past 5 years (on DBE-DCM, other than three years)

Reference:
☑ List of products have been made and list of testimonials; equipment list and contract

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Poll Questions

You will be prompted to respond to a poll question. We will give about 1-minute to submit your responses.

1. What are the top 3 risks that increase your bid on this project?
   - Time
   - Length of the project
   - Insurance
   - COVID concerns
   - Labor support
   - Too complicated

2. Does your service offer wheelchair bound transportation?
   - Yes
   - No

3. Does your service enforce COVID protocols?
   - Yes
   - No
Forecasting – Upcoming Projects

Projects-at-a-Glance Website

SnapShot: Projects-At-A-Glance
Welcome to SnapShot: Projects At A Glance. Mecklenburg County’s listing of upcoming contract opportunities.

In an effort to keep the public/business community informed of upcoming opportunities, we will update this tool to provide preliminary information and advance notice. Please note this list is not exhaustive of every project.

*Disclaimer: Information subject to change without notice – Quarterly updates are anticipated, frequency may vary.

To view current projects for bidding, visit:

<table>
<thead>
<tr>
<th>Parks</th>
<th>Greenways/Streams</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Build/Renovations</td>
<td>Maintenance/Repairs</td>
</tr>
<tr>
<td>A&amp;E - Design Services</td>
<td>Professional Services/Technology/Other Services/Goods</td>
</tr>
</tbody>
</table>

Mecklenburg County - SnapShot: Projects At A Glance
Professional Services | Other Services | Technology | Goods/Supplies Projects

Professional Services
- Construction - Maintenance/Repair
  - Land Use and Environmental Noise
  - Water Quality Assessment
- Professional Services/Technology/Other Services/Goods
  - Consulting Services

Other Services
- Other Services
  - Land Use and Environmental Noise
    - Tree Removal
  - Professional Services/Technology/Other Services/Goods

Technology
- Other Services
  - Park and Recreation
    - IT and Operations

Other Services
- Other Services
  - IT and Operations
    - Financial Systems ERP

Financial Systems ERP
- Other Services
  - Professional Services/Technology/Other Services/Goods
    - Consulting Services
Terra Site Capability Statement

- Contact Information
- Past Performance
- Differentiators
- Company Overview/Data
- Core Competencies
- Codes / Certifications / Licenses

Contact Information
www.codycontracting.com
800-525-5656
1-800-355-5224
info@codycontracting.com
info@codycontracting.com
Toll-Free: 888-822-9308
www.terrasiteco.com
5039 S. Saddlebrook Way, Suite 100
Boise, ID 83709
208-376-2337
www.terracontracting.com
532 S. 5th St.
Boise, ID 83702
208-342-1331
www.terrasiteco.com
5039 S. Saddlebrook Way, Suite 100
Boise, ID 83709
208-376-2337
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208-342-1331
Pre-bid Meetings/Conferences/Site Visits/Bid-Openings
Meet With Diversity/Inclusion Professionals
Meet with Mecklenburg County’s Small Business Team/Business Resource Providers
Meet With Departments / Project Managers
Participate In Networking Events (Meet & Greets, Etc.)
Associations/Chambers/Groups/Meetups, etc.
Strengthen Proposal-Bid Writing / Presentation / Interviewing
Strengthen Your Project And Financial Management
Navigate Prequalification documents/resources
Participate in Capacity Building Programs
Know your Differentiators and Competitive Advantage
Source Talent/Collaboration/Subcontracting/Partnerships
Separate Working In AND On Your Business
Document References And Testimonials
Take Pictures of Visual Projects When You Can
Ask Questions (remember, a closed mouth does not get fed)
Ask For Feedback (don’t take it personal – take it professional)
+ more....
The **Program** provides FREE expert assistance in supporting the entrepreneurs of Mecklenburg County with the highest standard of customer service that will foster growth and vitality to the business community.

The program is a One-Stop shop that navigates the business/ entrepreneurial resources available across the County and State.

- Entrepreneurs seeking to start or grow their business can receive customized guidance and advice on a variety of business topics
  - How to Start a Business in NC
  - Business Development/Feasibility Analysis
  - Military/Veteran Business Services
  - Relocating your Business
  - Training your Workforce
  - Creating a Business Plan/Strategic Plan
  - Marketing Plans
  - Taxes and Recordkeeping
  - Market Research
  - ...plus, much more

The **Program** stimulates business investment, creates and retain jobs, and provide increased opportunities for small businesses to obtain the capital they need to be successful.

The program objectives and services may include, but are not limited to the following:

- Prepare small businesses to access capital by assessing current creditworthiness
- Help businesses develop action plans to remediate credit challenges
- Leverage resources with several technical assistance providers as well as financial institutions
- Work with business owners to fine tune business plans and financial projections
- Prepare small businesses to access capital by assessing current creditworthiness
- Implement and monitor third-party small business loan fund
- Assist business owners and entrepreneurs to find financing that fits their needs and aligns with the financial institution’s lending objectives
- Assist businesses with the County’s Small Business Loan Program (*up to $75,000* - [Loan Program Website](http://loanprogramwebsite.com))

**Mark.Stewart@mecknc.gov** | **Program Website**
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**Fred.Atiemo@mecknc.gov** | **Program Website**
Poll Questions

1. Do you have a capability statement?
   - Yes
   - Yes, and I will send to BDI@mecknc.gov
   - No
   - No, but I will be working on one now!

2. If you are not certified, will you seek MWBE certification after today’s session?
   - Yes
   - Yes, but I need assistance
   - Unsure
   - No

3. My company would like to receive business supportive services and resources [business development (ex: business plan, etc.), financial management assistance (ex: cashflow, loan, credit coaching, etc.), capacity building (certification navigation, etc.)]
   - Yes
   - No

4. Have you met with anyone from the Office of Economic Development (including BDI Program Team)?
   - Yes
   - Yes, and I will be setting up another meeting soon
   - No
   - No, but I will be setting up a meeting soon
**Next Steps**

<table>
<thead>
<tr>
<th>Check-In</th>
<th>Mecklenburg County will solicit for a non-emergency medical transportation vendor services around March/April 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete</td>
<td>Complete your vendor registration with Mecklenburg County and the State of NC [<a href="http://www.meckprocure.com">www.meckprocure.com</a></td>
</tr>
<tr>
<td>Verify</td>
<td>Verify that your business is eligible for MWBE Certification and GET CERTIFIED</td>
</tr>
<tr>
<td>Visit</td>
<td>Regularly visit the MWBE Program website to keep up with Mecklenburg County’s Projects - At-A-Glance</td>
</tr>
<tr>
<td>Schedule</td>
<td>Schedule an introduction or check-in meeting with Mecklenburg County’s Office of Economic Development BDI Program</td>
</tr>
<tr>
<td>Begin</td>
<td>Begin working on your capability statement and schedule a meeting for review/feedback [<a href="mailto:BDI@mecknc.gov">BDI@mecknc.gov</a>]</td>
</tr>
<tr>
<td>Continue</td>
<td>Continue to Engage: -Build Relationships; -Seek Opportunities; -Strengthen Capacity; -Share Your Resources</td>
</tr>
</tbody>
</table>

**Contact Us!**

**Email:** [BDI@MeckNC.gov](mailto:BDI@MeckNC.gov)

**Website:** [OED.MECKNC.GOV/BDI](http://OED.MECKNC.GOV/BDI)

**Schedule a Meeting:**
- introduction meeting
- follow-up/touch point meeting
Mecklenburg County
Non-Emergency Medical Transportation

Office of Economic Development

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Business Diversity & Inclusion Program

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