

Proposal
March 2024

Puerto Rico Department of Health Money Follows the Person NEMT Analysis and Planning Contractor



Department of Health

steer

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Prepared by:

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Prepared for:

Department of Health
Medicaid Program, ATTN: Elizabeth Otero-
Martínez
268 Luis Muñoz Rivera Ave.
World Plaza – 5th Floor
San Juan, Puerto Rico 00918

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The logo for Steer, featuring the word "steer" in a bold, lowercase, sans-serif font.

Contents

Executive Summary	i
Letter of Intent.....	iii
1 Statement of Qualification	1
Who we are	1
Our Mission and Principles	3
How we work	4
Quality	5
Our Services.....	5
2 Scope of Work	32
Rising to the Challenge.....	32
Phase 1: NEMT gap analysis Plan (Work Plan)	32
Phase II: Identify Gaps (Conduct gap analysis).....	37
Phase III: Record, Review, consolidate and analyze recollected data.....	42
Phase IV: Findings and Recommendations	45

Figures

Figure 2.1: Example of the proposed structure for the current NEMT user survey.....	40
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Attachment

- A Attachment A: Cost Proposal – *Included Separately***
- B Attachment B: Vendor Reference Form**
- C Attachment C: Subcontractor Reference Form**
- D Attachment E: SLA's, Performance Standards and Contract Reminders**

Appendices

- A Scope of Work**
- B Two (2) Project Descriptions of Similar Projects**
- C Organizational Chart**
- D Qualifications of Team/Resumes/CV of Key Personnel**
- E Certifications**

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Puerto Rico Department of Health
Medical Program, ATTN: Elizabeth Otero-Martínez
268 Luis Muñoz Rivera Ave.
World Plaza - 5th Floor.
San Juan, Puerto Rico 00918

Dear Mrs. Otero-Martínez,

Money Follows the Person NEMT Analysis and Planning Contractor

Thank you for the opportunity for Steer Davies and Gleave Limited (**Steer**) to present this proposal. This project is of great interest to Steer, and we would very much like to contribute to its development. Our capabilities and experience are very closely matched with the services required to develop this project. Steer is one of the world's leading independent transport consultancies with a strong presence in Puerto Rico, and we have very strong credentials in:

- Transport Plans
- Federal Transportation Agencies Regulations
- Traffic Demand Analysis
- Parking Need Studies
- Project Feasibility Assessment
- Ridership and Revenue Analysis and Forecasting
- Demographic and Economic Analysis and Forecasting
- Transit Operations and Engineering
- Complete Streets Designs
- Transport Outreach Strategies
- Project Management
- Transport Finance Analysis
- Transit Operations and Engineering

We believe that the Puerto Rico Department of Health could benefit from our expertise in evaluating the current transport for the aged and disabled population in the island, define specific strategies on how to improve mobility and provide guidance and active participation throughout the process to get The Money Follows the Person Grant.

We certify that the information and data submitted is true and complete to the best knowledge of Liza Ríos Berrios, Steer Puerto Rico Office Leader. She has the Authority to Act on behalf of the company locally, including engaging in contractual agreements, and will be the primary contact for matters related to this proposal. Please do not hesitate to contact her for further information. We would be delighted to meet and discuss our proposal with you.

Yours sincerely,

Liza X. Ríos Berrios
Associate | Puerto Rico Office Leader
Liza.riosberrios@steergroup.com
t: +1 (787) 721 2002

Executive Summary

We are delighted to submit our proposal to support this proposal for the Department of Health for the Money Follows the Person proposal MFP NEMT Gap Analysis.

Proponent

We have structured a team of local consultants and international experts, which we consider are the ideal professionals to develop this project, with vast experience in gap analysis of public transportation, transport planning, public engagement, climate change, legislation and public policy, financing, and other relevant subject matters. Our proposed Consultant Team consists of engineers, planners, statisticians, and economists, which will work in the successful execution of the project, led by our proposed team leaders, both local, with excellent management capabilities. Our management team will be led by Senior Consultant and Licensed Professional Planner Andrea Iguina Pérez and supported and Associate and Engineer Liza Ríos Berrios.

Project Understanding

The first phase includes the basic project schedule plan and background information-gathering tasks targeted at determining present and projected demand for the transfer service to and from health care facilities. This phase will begin with the creation of the initial project schedule. The background information collection duties will begin with acquiring information about Puerto Rico's transportation infrastructure in relation to patient care. The data obtained will be used to evaluate the quality, efficiency, and coverage of current patient transportation services. This will entail determining the number of persons from various priority groups, such as people with disabilities, elderly citizens (aged 60 and up), and dialysis patients, among others. At the end of this phase, we will create a baseline geospatial database to begin evaluating the information gathered from background research and stakeholder interactions.

In phase two, we will create and perform a survey to identify gaps. The sample size required for each of the various relevant segments will be determined using the population dimensioning that was accomplished in step one. The survey design will be implemented, consisting of numerous question blocks that will allow us to learn about the characteristics of the users, the aspects of their recent transfers to health care facilities, the evaluation of the service, and the areas in need of development, among others. The logistics of the survey will be prepared, showing the many methods in which it will be carried out: in person, phone and online, as well as how the survey will be disseminated, which may be featured on the Department of Health website to boost the in-person sample. We commit to ensure that the survey logistics are comprehensive and culturally competent. Especially since we are completely aware of the needs of the Puerto Rican community. The data will be organized in a database that will contain the specifics of all the respondents' replies.

Phase three will evaluate the collected data and offer statistics on the many elements of interest. The study will identify gaps in the current situation, such as the extent of transportation service coverage, weaknesses, efficiency, dependability, safety, needs, and potential for development, among other factors. The obtained data will be georeferenced to generate themed maps that depict the statistics and gap analysis. We recommend creating a dashboard to show the survey's summary data and major gap analysis. The use of a geographic information system for developing themed maps is also being studied. Once the gaps have been identified, ideas for improvement will be made, culminating in a framework for prioritizing the various segments and categories of consumers in the transfer benefit distribution process. We will assist in the establishment of the project's Operational Protocol by developing a cultural competence strategy as well as the design and implementation plan.

The final product will combine the work accomplished in earlier phases, as well as the development of findings and suggestions, which will include graphic components for presenting results, such as infographics, dashboards, or maps.

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Puerto Rico Department of Health
Medicaid Program, ATTN: Elizabeth Otero-
Martinez
268 Luis Muñoz Rivera Ave.
World Plaza – 5th Floor
San Juan, Puerto Rico 00918

Dear Mrs. Otero-Martínez,

Letter of Intent

We submit this letter of intent to notify the Department of Health of Steer's intention to submit a proposal for the Money Follos the Person NEMT Analysis and Planning contractor opportunity.

We pride ourselves to be one of the few Puerto Rico transit system experts and one of the best contenders for this project. Our international experts, along with the local staff, offer the finest combination of innovation, global best practices, and adaptation of our reality on the island to generate the best product for the benefit of Puerto Rico's residents.

Yours sincerely,

Liza Ríos Berríos
Associate | Puerto Rico Office Leader
787-721-2002
liza.riosberrios@steergoup.com

1 Statement of Qualifications

Who we are

Working across cities, infrastructure and transport, Steer is a global business consultancy providing clients with a commercial and competitive edge.

We are a global consultancing firm specializing in cities, insfraestructure and transportation that combines commercial, economic, technical and planning expertise to find powerful answers to our clients' complex challenges. Answers that help people, places and economies thrive.

Steer spans 26 offices across four continents, with an Office in San Juan since 1955, working together to make a real difference. Since 1978 to date, we have worked on **over 22,000 projects in 150 countries**, accumulating more tha 45 years of expererience, providing planning and advisory services to public and private sector clients.



Source:Steer

In our San Juan office, we have provided integrated solutions that are both creative and practical.

At State level we have worked and delivered:

- Puerto Rico Long Range Multimodal Transportation Plan 2045
- Comprehensive Bicycle and Pedestrian Plan for Puerto Rico
- Complete Streets Plan and Design Guidelines
- Prioritization Bicycle and Pedestrian for Puerto Rico Highways and Transportation Authority (PR-102 and PR-115).
- Puerto Rico Long Range Multimodal Transportation Plan 2050

At Municipal level we have worked and delivered:

- Comprehensive Transportation Plan for the Municipality of San Juan
- Short-Range Strategic Transit Plan for the Municipality of Vega Baja
- Bayamón Strategic Transportation Plan
- Morovis Short-Range Strategic Transit Plan.

- Short-Range Strategic Transit Plan for the Municipality of Guayama
- Transit Development Plan for the Municipality of Toa Alta
- Toa Baja Strategic Transportation Plan
- Fajardo Fixed Route Bus Expansion Study
- Complete Street Study for the Municipality of Canóvanas
- Transit Plan for the Municipality of Patillas
- Strategic Multimodal Transportation Plan for Cataño.

We are now developing:

- Strategic Transit Plan for Vega Alta Municipality
- Mayaguez Comprehensive Transportation Study
- Transit Study for the Municipality of Ceiba
- Trujillo Alto Complete Street's Plan & Design

All projects have major components of transit and comprehensive transportation. We can complement our technical solutions with expert advice on community engagement, procurement, financing, operation, regulation and securing of planning for transport systems

Our Mission and Principles

Our Mission and Principles were developed by employees to provide a benchmark that applies to all employees, the Board and Trustees of the Voting Trust against which performance can be judged and decisions and behaviours guided.

These are written into the constitution of the Company as part of the Voting Trust Deed and as such their use is mandatory by the Company.

- **Leading transport consultancy:** To be recognised by our clients and prospective clients as the leading international consultancy in transport and related sectors.
- **Markets and Clients:** To serve those markets and clients that recognise and reward the value of our services.

- **Responsible locally and globally:** To be respectful, considerate and supportive of the communities, cultures and environments in which we work.
- **Respected and respectful employer:** To have motivated, rewarded and fulfilled employees and to enable Eligible Employees to be able to contribute to the success of the Company.
- **Profits, growth and long-term stability:** The Company will always seek to be profitable and aims to increase its value year on year.

How we work

Infrastructure, cities and transport are constantly evolving to meet new demands, new ideas and new technologies. Mixing rigor and technical expertise with an open-minded imaginative approach, we can help our clients maximize opportunity and realize value within this rapidly changing landscape across the following 5 basis:

- **Working as specialist:** Broad expertise produces broad answers. We are a firm of specialists: strategists, researchers, analysts, economists, planners, designers, engineers and technologists.
- **Combining all our expertise:** It takes joined-up thinking to create a world where people, places and economies thrive.
- **Staying impartial:** We are independent and truly impartial, with no external shareholders to please and no downstream construction services to sell.
- **Expanding on local knowledge:** Across the world, we are constantly finding new and better ways to meet our clients' needs, combining our local knowledge with global best practice.
- **Anticipating the future:** The future is an exciting but uncertain place. By combining smart thinking with grounded expertise, we help all our clients navigate change and anticipate future challenges.

Quality

We place considerable emphasis on understanding and meeting our client's requirements. Our quality management system (QMS) is designed to meet these needs and to ensure our work meets the highest standards. The company is certified to ISO 9001:2015

Our Services

Our experience covers all the modes, and we can classify them in 11 main areas:

- Transportation Demand Management
- Aviation
- Cities & Places
- Developments & Real States
- Energy
- Freight & Logistic
- Toll Facilities & Highway
- Ports, Ferries & Maritime
- Rail
- Sports Events & Leisure
- Urban Transit.

The following services are highlighted based on the RFP:

- **City Planning:** Our multi-disciplinary team combine technical analysis and best practices in planning to promote sustainable, integrated and future-proof solutions. Our design practice has a strong understanding of the relationship between the built environment and movement.
- **Economics:** Economic consulting has always been at the core of our service offer. We are recognized leaders and innovators in economic consulting, able to combine knowledge of official guidance, within different jurisdictions, with technical expertise and a willingness to innovate.

- **Technology & Digital:** We draw insights from across Steer to understand how technology is shaping cities, infrastructure, and transport. We support our clients to create policies, strategies, plans, and digital products centered around the end-user with a clear understanding of their unique context.
- **Equity & Inclusion:** Our team provides equity and inclusion (E&I) advice to our clients in our core global markets: transportation, cities, infrastructure, and community & economic development. We work to identify equity benefits and risks, and research, co-design, implement, and evaluate projects and policies to address them.

Project Experience

Related Project Experience

Feasibility Transportation Study – Elderly Services

Team Members: Carmen Correa, (Project Manager)

The proposed system was designed to transport San Juan citizens aged 60 and above or with poor mobility to the Veterans Hospital or Medical Center, which sees 1.3 million patients each year. Based on socioeconomic study, current services, and survey results, Steer designed the system's operational design, which included vehicle types, routes, service, expected demand, and costs.

Recent Transportation Projects

To validate our experience with FTA projects related with Transportation Planning in Puerto Rico, we have selected twenty-one (21) projects developed by Steer in the past decade in Latin America, from more than one hundred (100) transportation projects executed in Puerto Rico.

We understand the scope of work required for the services under FTA, to date we have developed over eighteen (18) similar projects with FTA funds,

all of which have been 100% successful and without comments from the *Oficina de Enlaces Federales*.

The following section presents detailed information from the selected projects relevant. Additional information can be provided upon request.

Figure 1.1: Steer’s Local Recent Transportation Projects



Source: Steer

Strategic Transit Plan for the Municipality of Vega Alta

Client: Municipality of Vega Alta

Contact Information: Beatriz Rivera

Phone: 787-883-5900 x.1244

Year: 2024 – Present



Team Members: Liza Ríos (Project Director, Traffic Expert),

Andrea Iguina (Project Manager, Planner), Leon García (Transit Expert), Michelle Sánchez (Transit Expert and Mapping), Grace Delgado (Technical Support), and Luis Fernando Garzón (Mapping and Illustrations Expert).

The municipality of Vega Alta commissioned Steer to develop a strategic plan for the evaluation of the existing transit system and to recommend improvement and expansion of the Vega Alta transit service.

Complete Streets Study for the Municipality of Trujillo Alto

Client: Municipality of Trujillo Alto

Contact Information: Luis Rivera

Phone: 787-761-0172 X.2174

Year: 2024 – Present

Team Members: Silvia Mejía (Project Director, Complete Street Expert), Liza Ríos (Project Manager, Traffic Expert), Michelle Sanchez (Deputy Project Manager, Planner).

The Municipality of Trujillo Alto commissioned Steer to develop the Plan and Design of Complete Streets in the municipality. The implementation of this plan will allow for strategic improvements to the pedestrian corridor, improvements to roads and other alternatives.

Transportation Study for the Municipality of Ceiba

Client: Municipality of Ceiba

Contact Information: Yamiris Torrens

Phone: 939-253-4006

Year: 2023 – Present



Comprehensive
Transportation Study
Municipality of Ceiba

Team Members: Liza Ríos (Project Director, Traffic Expert), Andrea Iguina (Project Manager, Planner), Leon García (Transit Expert), Michelle Sánchez (Transit Expert and Mapping), Grace Delgado (Technical Support), and Luis Fernando Garzón (Mapping and Illustrations Expert).

The municipality of Ceiba contracted Steer as consultants with expertise in transportation for the development of the comprehensive plan for the evaluation of Ceiba's transit system. This study will promote the economic development of Ceiba and present solutions for the actual and future deficiency in the transit system in the municipality.

Comprehensive Transportation Study of the Transit Service and Transit Infrastructure in the Municipality of Mayagüez

Client: Municipality of Mayagüez

Contact Information: José Flores del Toro

Phone: 787-834-4100 x. 1824

Year: 2023 – Present



Transit Service &
Transit Infrastructure Plan
Municipality of Mayagüez

Team Members: Liza Ríos (Project Director, Traffic Expert), Andrea Iguina (Project Manager, Planner), Leon García (Transit Expert), Michelle Sánchez (Transit Expert and Mapping), Grace Delgado (Technical Support), and Luis Fernando Garzón (Mapping and Illustrations Expert).

The Municipality of Mayagüez contracted Steer as qualified consultants with expertise in transportation and in USDOT rules and regulations of FTA for the development of a comprehensive transportation study of the transit service and infrastructure in the municipality of Mayagüez.

Strategic Multimodal Transportation Plan for the Municipality of Cataño

Client: Municipality of Cataño

Contact Information: Yolanda Maldonado

Phone: +1 (787) 788-7227 ext. 4174

Year: 2022-ongoing

Team Members: Liza Ríos (Project Director, Traffic Expert), Andrea Iguina (Project Manager, Planner), Leon García (Transit Expert), Michelle Sánchez (Transit Expert and Mapping), Grace Delgado (Technical Support), and Luis Fernando Garzón (Mapping and Illustrations Expert).



2023

**Strategic Multimodal
Transportation Plan**
for the Municipality
of **Cataño**



Steer is developing the Strategic Multimodal Transportation Plan, which will guide the implementation and development of the transit system for the Cataño municipality, with the purpose of implementing a financially feasible public transportation system to facilitate the mobility and access of their residents.

Short-Range Transportation Plan for the Municipality of Patillas

Client: Municipality of Patillas

Contact Information: Elizabeth Velez

Phone: +1 (787)839-4120 Ext. 234

Year: 2022-2023

Team Members: Liza Ríos (Project Director, Traffic Expert), Andrea Iguina (Project Manager, Planner), Leon García (Transit Expert), Michelle Sánchez (Transit Expert and Mapping), Grace Delgado (Technical Support), and Luis Fernando Garzón (Mapping and Illustrations Expert).



Steer is developing the Short-Range Transportation Plan for the Municipality of Patillas. The plan has a multimodal emphasis and will provide an evaluation and diagnostic of the current circumstances of Patillas' transportation systems as well as identify and propose improvement measures at various phases of development.

Transit Plan for Municipality of Fajardo

Client: Municipality of Fajardo

Contact Information: José F. Moreira Díaz

Phone: +1 787-860-7270

Year: 2022-2023



Team Members: Liza Ríos (Project Director, Traffic Expert), Michelle Sánchez (Project Manager, Planner), Andrea Iguina (Public Outreach Expert), Leon García (Transit Expert), Grace Delgado (Technical Support), and Luis Fernando Garzón (Mapping and Illustrations Expert).

Steer developed the Fajardo Fixed Route Bus Expansion Study using our expertise in transportation, USDOT rules and FTA regulations to guide the preparation the plan that will guide the expansion and development of the current transit system in Fajardo.

Feasibility Analysis for the Implementation of Complete Streets Policy in the Municipality of Canóvanas

Client: Municipality of Canóvanas

Contact Information: Leslie Rivera

Phone: +1 787-795-1075

Year: 2022-2023



Team Members: Andrea Iguina (Deputy Project Manager and Public Outreach Expert), Grace Delgado (Data Collection)

The Municipality of Canóvanas commissioned us as qualified planning firms, with expertise in transportation planning with the USDOT rules and regulations of the FTA to complete a Feasibility Analysis for the Implementation of Complete Streets Policy in the Municipality of Canóvanas. This policy allows for strategic improvements to the pedestrian corridor, improvements to roads and other alternatives. Its main purpose is to complement and enhance the existing transit system (SITUR).

Toa Alta Transit Service Development Plan

Client: Municipality of Toa Alta

Contact Information: Jossie Correa;

Phone: +1 (787) 870-2100 Ext. 1400/1402

Year: 2021-2023



Team Members: Liza Ríos (Project Director, Traffic Expert), Leon García (Transit Expert), and Luis Fernando Garzón (Mapping and Illustrations Expert)

Steer developed of the Transit Service Development Plan, to provide guidance to the Municipality in the implementation of a transit service in Toa Alta. The project will evaluate the current condition, considering public participation to get the implementation plan attending the needs of the population in Toa Alta.

2050 Multimodal Long Range Transportation Plan

Client: Puerto Rico Highway Authority

Contact Information: Carlos Fernández;

Phone: +1 (787) 721-8787 Ext. 1652

Year: 2022-present

Team Members: Liza Ríos (Project Manager), Andrea Iguina (Project Coordinator), Leon García (Transit Expert), Grace Delgado (Technical Support), Michelle Sánchez (Technical Support, Mapping Expert), and Luis Fernando Garzón (Mapping and Illustrations Expert).



The 2050 Multimodal Long Range Transportation Plan set out the planning framework for all modes of transportation projects for Puerto Rico. The purpose of this plan is facilitating the safe and efficient management, operation, and development of surface transportation systems in each one of Puerto Rico's municipalities; while serving the diverse, present, and long-term mobility needs of people and freight, including accessibility by pedestrian walkways and bicycle transportation facilities up to 2050.

Short-Range Transportation Plan for the Municipality of Guayama

Client: Municipality of Guayama

Contact Information: Arnaldo Rodríguez

Phone: +1 (787) 862-2155 Ext. 2023

Year: 2021-2023



Team Members: Liza Ríos (Project Director, Traffic Expert), Leon García (Transit Expert), and Luis Fernando Garzón (Mapping and Illustrations Expert)

Steer developed the Short-Range Transportation Plan for the Municipality of Guayama to provide Guayama with policy and financial guidance to guide investment decisions for improvements in future transportation planning, investment, and transportation policy decisions. The overall purpose of the plan is to know how to improve the mobility and accessibility of its residents from residential areas to urban center, hospitals, educational facilities, work centers, including recreational and tourist areas.

Toa Baja Strategic Transportation Plan

Client: Municipality of Toa Baja

Contact Information: Anilda Fernández Vega

Phone: +1 (787) 261-0202

Year: 2021-2024



Team Members: Liza Ríos (Project Manager, Traffic Expert), Leon García (Transit Expert), and Luis Fernando Garzón (Mapping and Illustrations Expert)

Steer is finishing the development of the Strategic Transportation Plan to analyze the transportation infrastructure and services in the Municipality. The project has a focus on the evaluation of the current active transportation, congestion, and transit conditions in the municipality of Toa Baja.

Morovis Strategic Short-Range Transit Plan

Client: Morovis Municipality

Contact Information: Jaime Maldonado

Phone: +1 (787) 862-2155 Ext. 2023

Year: 2020-ongoing

Team Members: Liza Ríos (Project Manager, Traffic Expert), German Lleras (Transit Expert – Peer reviewer), Leon García (Transit Expert)



Steer is developing Morovis Short Range Transit Plan in order to improve the accessibility and mobility of residents to the urban area through the creation of a public transport system. The development of the plan includes description of existing conditions, forecast of the future population and employment growth, identification of the current and projected transportation problems and needs, analysis of improvement strategies, financial plan and strategies of implementation including component of public involvement in the decision-making process.

Bayamón Strategic Transportation Plan

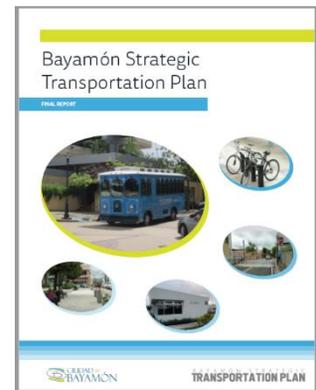
Client: Bayamón Municipality

Contact Information: Emanuel Gómez;

Phone: +1 (787) 780-5552 Ext. 2436

Year: 2020

Team Members: Liza Ríos (Project Manager, Traffic Expert); Luis Fernando Garzón (Graphic), Leon García (Transit Expert).



The strategic transportation plan for the municipality of Bayamón will be the new road map for transportation policy now and into the future. It examined Bayamón's transportation system against current and future mobility needs, community objective and values, and provided a blueprint for future travel. The development of this Strategic Transportation Plan included transit, non-motorized modes, motorized modes, and transportation infrastructure assessment.

2045 Long Range Transportation Plan

Client: Puerto Rico Highway Authority

Contact Information: Carlos Fernández;

Phone: +1 (787) 721-8787 Ext. 1652

Year: 2017-2020

Team Members: Liza Ríos (Data Collection Leader),
German Lleras (Reviewer)



Puerto Rico Highway and Transportation Authority (PRHTA) hired Steer to develop the 2045 Long Range Transportation Plan. It was approved by the Metropolitan Planification Organization on December 5th, 2018 (further documentation can be found on the website <http://www.dtop.gov.pr>). The plan's goal was to establish a multimodal transportation system in a safe and secure manner that is accessible for all movement capabilities and the movement of both goods and individuals while focusing on infrastructure resilience, therefore promoting habitable and accessible communities and a sustainable socioeconomic growth.

As part of the plan execution, resilience analysis was undertaken, which focused on identifying the vulnerable structures regarding landslide and flood threats. This was done by the gathering of information y collaboration with the Public & Transport Department (DTP) and network analysis by data clustering.

Comprehensive Bicycle and Pedestrian Plan for Puerto Rico and Complete Streets Plan and Design Guidelines



Client: Puerto Rico Highway Authority

Contact Information: Carlos Fernández;

Phone: +1 (787) 721-8787 Ext. 1652

Year: 2015

Team Members: Liza Ríos (Deputy Project Manager)

Both, the Comprehensive Bicycle and Pedestrian Plan & the Complete Streets Plan and Design Guidelines, were adopted on the 18th of September's 2018 MPO being the first plans of its kind developed island wide (documents can be found in <http://www.movilidadparatodospr.com/web/>). They seek to make bike use and walking a safe, accessible and integrated form of transportation for residents and visitors of Puerto Rico ranging from all ages and mobility capacity in accordance with the habitability initiatives.

The final product was a 'user friendly' guide with design standards, diagrams and illustrations presenting the appropriate design principles, which is part of the tools for state and local agencies as well for design and planning specialists.

Comprehensive Transportation Plan for the Municipality of San Juan

Client: Municipality of San Juan

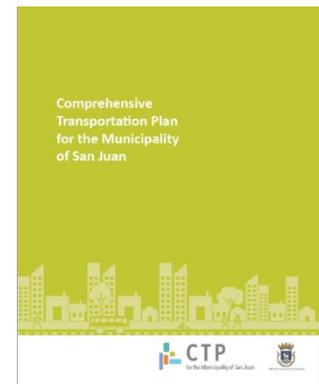
Contact Information: Jorge Hernandez;

Phone: +1 (787) 480-2302

Year: 2015-2016

Team Members: Germán Lleras (Project Manager) Liza Ríos (Deputy Project Manager), Luis Fernando Garzón (Mapping and Illustrations)

The Autonomous Municipality of San Juan contracted Steer as consultants with experience in transportation and the rules and regulations of the USA DOT FTA to develop a Comprehensive



Transportation Plan. This opportunity included the definition of the structure of the Municipal Transportation Office, evaluation and proposals for transit, traffic and parking strategies in the Municipality. The CTP was developed as part of the San Juan Land Use Plan in order to guide the transport policies and the transport investment programming. This Plan was completed in October 2016.

Short Range Strategic Transit Plan for the Municipality of Vega Baja

Client: Municipality of Toa Baja

Contact Information: Hon. Marcos Cruz Molina

(Mayor)

Phone: +1 (787) 855-2500 Ext. 2202

Year: 2018-2019

Team Members: Liza Ríos (Traffic Expert, Technical Support)



The Autonomous Government of Vega Baja

Municipality requests proposals from qualified consultants, with expertise in transportation planning and United States Department of Transportation (USDOT) rules and regulations of the Federal Transit Administration (FTA). for the development of a Short-Range Strategic Transit Plan for Vega Baja. The Plan was developed in January 2019.

The general purpose of the plan was to provide the municipality of Vega Baja with policy and financial orientation to guide improvement investment decisions to the future planning of the transport, and transit policy decisions. In addition, the plan established how to improve the mobility and accessibility of its residents from residential areas to the center urban, hospitals, educational facilities, shopping and work centers, also including recreation and tourism areas.

Caguas-San Juan Commuter Rail Project

Client: Puerto Rico Public Private Partnership Authority

Contact Information: Lic. Victor Chaparro;

Phone: +1 (787) 497-2525 Ext. 5004

Year: 2013-2014

Team Members: Liza Ríos (Data collection Leader)



Steer was contracted as the technical advisor to the Puerto Rico PPP Authority related to the preparation of a commuter rail scheme between the Municipality of Caguas and a Tren Urbano station in San Juan.

We were contracted to prepare sketch level planning and investment grade ridership and revenue forecasts as well as support the advisory team in defining a preliminary preferred alternative. As part of the preliminary alternative's analysis, the technical team has provided advice on technology alternatives, alignment, station location, ridership demand increase options, and cost projections.

Members of our proposed team are working on this opportunity strengthening our knowledge of the local context and commuters to San Juan travel patterns. This project is due for completion in May 2014.

BRT Feasibility Study between Toa Baja & Bayamón

Client: Puerto Rico Highways & Transportation Authority

Contact Information: Edgar Rodríguez;

Phone: +1 (787) 765-0927 x2282

Year: 2010-2011

Team Members: Germán Lleras (Transit systems expert)



Steer was contracted to prepare ridership and revenue estimates for a Bus Rapid Transit system (BRT) along the PR-22 and PR-5 median to connect a proposed

Park and Ride facility in Toa Baja to the Tren Urbano station in Bayamón. The project included traffic counts, origin-destination surveys, and focus groups. An operations coordination plan between the BRT and the Tren Urbano was prepared as part of this study.

International

Electromobility in Santiago

Client: World Bank

Contact Information: Ravi Vasudevan;

Phone: +1 (202) 473-1118

Year: 2019-2020

Team Members: León García (Expert in clean technologies), Luis Fernando Garzón (Graphic)

The main objective of the study was to increase awareness on pathways to reduce emissions in the transport sector through sharing Chile's transition towards sustainable mobility in Santiago. The means to do this was the production of a report and video prepared for different audiences, that covers three topics:



- Contribution of electric buses to sustainable mobility and the medium to measure it
- Experiences related to planning, preparation, and management, including context elements that have facilitate introduction of electric buses in Santiago
- Importance of technology in the increase of public transport standard and relation with climate change commitments.

Infrastructure & Mobility 2030 Plan in Antioquia, Colombia

Client: Antioquia Municipality

Contact Information: Leticia Hoyos;

Phone: +57 4 383 7901

Year: 2013-2015

Team Members: German Lleras (Expert in Project Structuring), Elena Chiari (Technical Support)

This project consisted in the development of a strategic planning exercise about the infrastructure network in Antioquia identifying investment needs and maintenance hierarchical level road network road , other modes of transport and logistic platforms until 2030 , in periods of 4 years by the use of robust decision methods for different scenarios of regional economic growth and structural changes in products , location of activities and flows of imports and exports between sub-regions of Antioquia, and between Antioquia and the rest of the country and the world .

And formulate guidelines, and measures to promote inter-municipal and municipal sustainable mobility (urban and rural) in the Department

Evidence of Organizational Capacity

Leadership

The project will be supported by professional leaders and those who have previous experience with comparable projects. This will guarantee that fresh ideas are integrated into the overall endeavor.

Liza Ríos Berrios, Project Director, and Transit Expert

Steer Puerto Rico Office; liza.riosberrios@steergroup.com; t. +1 787 721 2002

Liza Ríos Berrios

Title – Associate, and Office Leader

Position – Project Director and Transit Expert

Years' Experience – 12+

Education – University of Puerto Rico, BS Civil Engineering.

Language – English and Spanish

Liza is the local Associate, and Office Leader with authority to act on behalf of Steer's San Juan office.

Liza is a Civil Engineer with more than 11 years in Steer. She is fully bilingual in Spanish and English. She has worked projects in Puerto Rico, Mexico, Brazil, Panama, Colombia, Abu Dhabi, among other countries. Her experience is mostly focused on traffic impact analysis studies, development of strategic transportation plans for both motorized and non-motorized modes, demand and revenue

forecast studies, and studies regarding transit (public transportation) systems. Liza has knowledge of various modelling software, including CUBE Voyager, Vissim, Viswalk, Emme, HCS and Synchro.

In recent years, Liza's career has been focused on road infrastructure and planning projects both at regional and municipal levels. Throughout different experiences she has developed methodologies considering the characteristics and challenges of each community. This includes the assessment of regional needs and policies and their alignment with municipal plans, allowing to incorporate key stakeholders and dedicate more time in the decision-making process (for informed decisions). Examples of projects in which she developed these tasks include: the regional plan for Puerto Rico, Complete Streets Plan and Design Guidelines for PR

and Comprehensive Bicycle and Pedestrian Plan for Puerto Rico and Puerto Rico Long Range Multimodal Transportation Plan 2045.

She has vast experience in project management, having lead teams in the successful delivery of projects for the past 11 years. For instance, Liza has delivered the Bayamón Strategic Transportation Plan, and the Morovis Short Range Strategic Transit plan, applying our experience with new activities facing the situation that is being experienced worldwide, COVID-19. Recently, Liza has successfully delivered the Toa Baja Strategic Transportation Plan and 2050 Multimodal Long Range Transportation Plan.

Liza has worked as the Project Director in similar projects as the Short-Range Strategic Transit Plan for the Municipality of Guayama, the Toa Alta Transit Service Development Plan, Fajardo Fixed Route Bus Expansion Study, and the Short-Range Transportation Plan for the Municipality of Patillas. Currently Liza is working as Project Director in the Transit Study for the Municipality of Ceiba and Mayagüez Comprehensive Transportation Study.

Andrea R. Iguina Pérez, PPL Project Manager & Planner

Steer Puerto Rico Office; andrea.iguina-perez@steergroup.com; t. +1 787 721 2002

Andrea R. Iguina Pérez

Title – Senior Consultant

Position – Project Manager and Planner

Years' Experience – 7+

Education – University of PR, BS Politic Sciences; MA Planning

Language – English and Spanish

Andrea is a locally Licensed Professional Planner from our Puerto Rico Office. Andrea has over 7 years of local and national project management expertise and is experienced working with several stakeholders. She has overseen multiple transportation projects in various municipalities. She is fully bilingual in Spanish and English.

At professional level, has had the opportunity to work with a variety of projects including the development of the 2050 Long Range Transportation Plan, complete streets projects, among others. She began her professional life as Project Coordinator for the Agenda Ciudadana Foundation in 2015; where she coordinated over 30

participatory dialogue sessions on the topics of Environment, Economy, Energy, Families, Early Childhood and among others. In 2018 she was part of TFEC, a community foundation located in Harrisburg, Pennsylvania, where she worked as a Program Officer distributing over one million dollars in grants to non-profit organizations in the area. Andrea has knowledge in various software's such as Sawtooth, Jupiter Notebook, and Python.

Currently Andrea is the Project Manager for the Comprehensive Transportation Study of the Transit Service and Infrastructure in the Municipality of Mayagüez and the Transit Study of the Municipality of Ceiba. Andrea has also managed other projects such as Strategic Multimodal Transportation Plan for the Municipality of Cataño, Short Range Transportation Plan for Patillas, and Deputy Project Manager for the Canóvanas Complete Streets Study.

As the Project Manager for this project, Andrea will be involved in all aspects of the project.

Michelle Sánchez Hernández, Deputy Project Manager & Planner

Steer Puerto Rico Office; michelle.sanchezhernandez@steergroup.com; t. +1 787 721 2002

Michelle Sánchez Hernández

Title – Consultant

Position – Deputy Project Manager & Planner

Years' Experience – 7+

Education – University of PR, BA Civil Engineering; MA Planning

Language – English, and Spanish

Michelle has a bachelor's degree in civil engineering from University of Puerto Rico (UPR), Mayagüez Campus and a master's degree in planning from UPR, Río Piedras Campus. She was involved in transportation initiatives during her college career, especially in the topics of active transportation, and complete streets. For the past 7+ years she has been working in consulting firms in the areas of market analysis, economics, planning, and historic preservation, especially supporting the areas of GIS

and data analysis.

Michelle has been the Project Manager (PM) for project related to transit in the municipality of Fajardo and is currently the Deputy PM of the Complete Streets Study for the Municipality of Trujillo Alto.

As the Project Manager for this project, Michelle will be involved in all aspects of the project.

Liliana Pereira, Associate, Diversity and Inclusion Expert

Steer Washington, Office; liliana.pereira@steergroup.com; t. +1 703 910 3848

Liliana Pereira

Title – Associate

Position – Diversity and Inclusion Expert

Years' Experience – 17+

Education – Universidad Nacional de Colombia, BS Civil Engineer, HEC Paris, MS Finance

Language – English, and Spanish

Liliana is an experienced consultant with over 17 years of experience in strategic planning projects, including public policies, infrastructure, public transportation, railways, and highways. She began her career in the Transportation Research Program at the National University of Colombia. She joined Steer after her time at TransMilenio, the renowned transportation system in Bogotá, where she worked as a key member of the transportation planning team, responsible for demand projections and overall planning of new trunk and feeder services.

Liliana leads our growing team in Mexico, as well as our operations in Latin America. She has led over 60 projects with multidisciplinary teams internationally, focusing on public transportation, railways, infrastructure transactions, strategic policies, and investment advisory for a wide range of clients from both the public and private sectors.

Carmen Correa, PPL, Project Manager

Steer Los Angeles, Office; carmen.correalafuente@steergroup.com

Carmen Correa

Title – Head of North America
Planning

Position – Diversity and Inclusion
Expert

Years' Experience – 18+

Education – University of Puerto
Rico, Graduate School of Planning
MA, Planning

Language – English, and Spanish

Carmen is the Head of our North America Planning. She is a planner with solid commercial background and 18 years of project management experience in transport consultancy. She holds a Professional Planner license issued by the Department of State of Puerto Rico. Carmen joined Steer's Puerto Rico office in 1998 and for a span of 16 years managed a varied portfolio of planning and advisory projects for the Puerto Rico Highways and Transportation Authority, including benefit-cost analysis for transit and dynamic toll lanes as part of TIGER Discretionary Grants; alternative analysis studies for auto, transit and non-motorized modes; prioritizing infrastructure improvements; investment-grade feasibility studies for public-private-partnership consortiums; environmental impact statements; master plans; traffic and revenue forecasting; and traffic studies. She has simultaneously directed multiple projects with international teams for public and private sector clients.

Carmen has mega-projects experience working with the Planning and Sustainability Branch of the California High-Speed Rail Authority, where she recently prepared their first Land Use Master Plan. With WALKS Sacramento Carmen analyzed the inclusion of Complete Streets' concepts on the Sacramento's Pedestrian Program plans and Community General Plans. Also provided comments on the City of Sacramento Pedestrian Crossing Guidelines. As part of the Safe Routes to School program, she designed traffic surveys, offered 'recess education' to kids, and conducted data entry for standardized travel-pattern surveys that fed into a National database.

Key Project Staff

Grace Delgado Navarro, Technical Support

Steer Puerto Rico Office; gracemarie.delgadonavarro@steergroup.com; t. +1 787 721 2002

Grace Delgado Navarro

Title – Assistant Consultant

Position – Technical Support

Years' Experience – 3+

Education – University of PR, BA Business Administration; MA Planning

Language – English, and Spanish

Grace has a bachelor's degree in business administration with a concentration in International Trade from the University of Puerto Rico, Humacao Campus and completed her master's degree in planning with a concentration in Economy and Community from the University of Puerto Rico, Río Piedras Campus. Within her professional development she has worked as a logistics coordinator exporting wagons to different countries, was a statistics tutor, has participated in

data collection through ArcGIS Pro for the creation of an environmental risk mitigation plan and has participated in the planning for the creation of a linear park within the city.

Grace has been involved with the development of transportation projects in Canóvanas, Cataño, Toa Baja, Fajardo, Guayama, Patillas, Mayagüez, Ceiba and Vega Alta.

The Mapping and Illustrations team will support all aspects of the project. They will prepare the graphics for the reports, presentations, and the outreach activities. The team includes a graphic designer and a GIS expert, both under the guidance from the team Lead and Project Manager.

Additionally, other consultants of the Company are expected to take part in the development of the project for specific activities, supervised by the Project Manager.

Jose Castro, Survey Design, Data Collection and Discrete Choice Expert

Steer Bogota, Colombia Office; jose.castro@steergroup.com; t. +57 601 555 9067

Jose Castro

Title – Principal Consultant

Position – Expert in survey design, data collection and discrete choice

Years' Experience – 7+

Education – Universidad del Norte, Barranquilla, Colombia BS, Civil Engineer; MS, Civil Engineer

Language – English, and Spanish

Jose has a background in civil engineering and a master's degree in Transportation from the Universidad del Norte in Barranquilla, Colombia. During his career he has accumulated extensive experience in market research techniques, specializing in stated preference studies and transportation planning. Jose has participated in the development of more than 30 discrete choice studies in Colombia, El Salvador, Canada, the Dominican Republic, Peru, and Mexico. His

knowledge and skills cover all project phases: study planning, survey design, choice modelling, and analysis of results. He has developed demand models for new modes of transport, including public bicycles, scooters, cable cars, BRT, metro, trams, and trains. In recent projects, he has developed demand models with a focus on gender gap.

Alex Mitrani, Survey Design, Data Collection and Discrete Choice Expert

Steer Santiago, Chile Office; alex.mitrani@steergroup.com; t. +56 2 2757 2621

Alix Mitrani

Title – Associate

Position – Expert in survey design, data collection and discrete choice

Years' Experience – 25+

Education – Leeds University, MS Transport Planning & Engineering, University of Edinburgh, BS Civil & Environmental Engineering

Language – English, and Spanish

Alex has over 25 years of experience in demand forecasting, choice modelling, statistical analysis, and programming. He has applied these skills to a broad range of projects in the transport and telecommunications sectors. Alex has specific experience in demand forecasting using choice models estimated with stated preference and / or revealed preference data. He has developed several custom-built demand-forecasting models. Alex has extensive experience of survey data

collection using a variety of methods including online panels, intercept surveys, online surveys with intercept invitations, and household surveys.

Ester Villavicencio, Survey Design, Data Collection and Discrete Choice Expert

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Ester Villavicencio

Title – Associate

Position – Expert in survey design, data collection and discrete choice

Years' Experience – 20+

Education – University of Santiago de Chile, Civil Engineer in Geography

Language – English, and Spanish

Ester has over 21 years of consultancy experience, specialized in the management and analysis of information, including databases and geographic information systems, and has participated in a wide range of projects. She has extensive experience of coordinating and managing multidisciplinary projects and teams, as well as in the planning of field work and data collection processes. She has designed and processed surveys of different types in the cities of Chile, Mexico, Brazil and Colombia (O-D surveys, stated preference surveys, perception surveys, among others). She has worked on many studies of demand for services and new products, with both online and face-to-face data collection.

Elena Chiari, Survey Design, Data Collection and Discrete Choice Expert

Steer Los Angeles, Office; elena.chiari@steergroup.com; t. +1 213 425 0941

Elena Chiari

Title – Principal Consultant

Position – Expert in survey design, data collection and discrete choice

Years' Experience – 11+

Education – Leeds University, MS Transport Planning and Engineering, Universidad Tecnológica de Panama, BS Civil Engineering

Elena is a transport consultant with over ten years of experience; most of her time at Steer as part of their offices in Bogota (Colombia), Panama City (Panama) and Los Angeles (United States).

Her experience spans a variety of disciplines including development planning, infrastructure, and policy planning; modeling and forecasting; changes

in behavioral patterns; policy, strategy, and regulation; and monitoring, evaluation, and impact assessment.

She specializes in the development and use of discrete choice models to predict changes in behavior and preferences of individuals, a valuable tool for assessing the impact of new modes or travel routes, and changes in travel characteristics (such as duration, costs, transfers, vehicle type, soft factors, etc.). This tool is applicable to other sectors such as telecommunications, energy, and marketing.

Her work experience is mainly in transport planning, urban transit and rail and highway infrastructure projects. She has specific expertise in the design and application of revealed and stated preference surveys and the development of discrete choice models to predict behavior change and preferences.

Cristian Aguazaco, Data Analysis & Web Development Expert

Steer Bogota, Colombia Office; cristian.aguazaco@steergroup.com; t. +57 601 328 9801

Cristian Aguazaco

Title – Senior Consultant

Position – Expert in data analysis and web development

Years' Experience – 6+

Education – Universidad Distrital Francisco Jose de Caldas, Bogota, Colombia, BS Electronic Engineer

Language – English, and Spanish

Cristian is an Electronic Engineer graduated from Universidad Distrital Francisco Jose de Caldas with knowledge and experience in data analysis, web programming and Intelligent Transport Systems (ITS). Since November 2018 he is part of Steer in the Bogota office, where he leads the Digital Intelligence team, supporting the technology strategy of this and other offices in the region.

He has participated in the development of solutions for the capture, analysis, management and forecasting of transportation and mobility data for both public and private clients in Colombia and countries such as Chile, México, Costa Rica, and Brazil. Cristian has worked in the development of web tools for data capture and validation in infrastructure and urban transportation planning projects, focusing on providing greater security and control over data capture and reducing the time

associated with its validations and consistency review, as well as the design and production of relational databases, and consulting in Intelligent Transport Systems (ITS).

Subcontractors

INFOCUS is our proposed survey experts. Steer and INFOCUS have work together as prime and subcontractor, respectively, with great success doing Origin/Destination and Stated Preference surveys. They will be in charge of doing Surveys.

Corporate Profile

InFocus@Business is a market research service provider with more than 20 years' experience in Puerto Rico, the Caribbean, and the United States. Because of the Company's thorough investigation practices and extensive market research experience, they are able to offer a wide range of services, including SWOT analyses; questionnaire design, data entry and calculation of field study results; focus group moderation, and computer, in person and telephone interviews. InFocus@Business caters to both small and large businesses in the public and private sector, and is experienced in all target markets (children, adults, professionals) and industries.

List of Clients

- US Department of Justice
- Dept. of Agriculture
- Banco Popular
- The Associates Finance
- Frito Lay
- Banco Santander
- Holsum
- Indulac
- VISA
- Pillsbury
- AMEX
- Procter and Gamble
- Mendez and Co.
- Holsum
- Master Food Interamerica
- Colgate Palmolive
- Clorox Company
- Maytag

- Pepsi
- Coca Cola
- Movistar
- Fast Food Management
- McDonalds
- IPSOS - Hispania
- Arteaga and Arteaga
- Cultural Access Group (California)
- J. Walter Thompson
- Leo Burnett
- Marksell
- Lilly del Caribe
- Abbott
- ICI Paints

References

As requested in the RFP, we are including firm's references in Appendix A Scope of Work.

- **Autonomous Municipality of Canóvanas** – Feasibility Analysis for the Implementation of Complete Streets Policy in the Municipality of Canóvanas.
- **Autonomous Municipality of Morovis** – Short Range Strategic Transit Plan for the Municipality of Morovis.
- **Autonomous Municipality of Bayamón** – Strategic Transportation Plan for the Municipality of Bayamón.
- **Autonomous Municipality of San Juan** – Comprehensive Transportation Plan for the Municipality of San Juan.
- **Puerto Rico Highway and Transportation Authority (PRHTA)** – Comprehensive Bicycle and Pedestrian Plan; Complete Streets Plan and Design Guidelines; Puerto Rico Long Range Transportation Plan 2045.

2 Scope of Work

Rising to the Challenge

The goal of this project is to thoroughly examine the present transportation conditions of the LTSS target population in Puerto Rico, and to assess the current needs of NEMT. As explained in the RFP, the Client wants an assessment of the various modes of transit, system accessibility for the elderly and disabled, eligibility for transportation services, system expenses, and how services will be administered by the MFP Project. We will conduct a gap analysis to identify potential deficiencies and needs for the NEMT system and provide recommendations for the future implementation of this system.

In the next section, we will state the process for this proposal based on our fundamental understanding of the proposal's requirements. We recognize that these approaches may vary based on the benchmark research that will be conducted in phase 1 to determine best practices in other cities in the United States. The approaches outlined in this benchmark analysis will influence the project's progress.

Phase 1: NEMT gap analysis Plan (Work Plan)

The first phase contains the initial project schedule plan and the background information-gathering tasks aimed at identifying the current and potential demand for the transfer service to and from health care centers. This phase will start with the elaboration of the initial project schedule that will guide the project development and that will be approved by the MFP project lead. The background information gathering tasks will start by collecting information about Puerto Rico's

transportation system regarding patient care. The data collected will assess the quality, efficiency, and coverage of existing patient transportation services.

The analysis of population statistics related to the target demand of the transportation service will also be considered. This will include identifying the number of people from different priority segments, such as people with disabilities, senior citizens (ages 60+), and dialysis patients, among others.

We will also collaborate with the client throughout all the project in their capacity building efforts and maintain an uninterrupted flow of communication.

At the end of this phase will develop preliminary geospatial database to start analyzing the information acquired from the background research and Stakeholder engagements.

The tasks for phase I are listed below:

Task 1: Study Coordination

This task includes all activities associated with the kick-off of the project.

At the beginning of the project, we will hold an inception meeting where we will present the Consultant Team, discuss the overall approach, key considerations, and potential risks, coordinate the data required for the execution of the proposed work plan, identify the members of the PRMP team involved in the project and finalize the project's schedule, identifying key decision points and potential follow-up meetings.

We will provide the Client with a preliminary list of documentation that we consider would be required for the development of the Plan. During the meeting, we will discuss the best approach to obtain this information, considering the multiple potential sources (e.g., national, and regional organizations, private operators, etc.).

Initial project schedule – Work Plan

An initial project schedule will be prepared and submitted to the client during the first **2 weeks** of the project. As required in the RFP documentation, the project schedule will include a breakdown of all tasks along with their duration, responsibilities, milestone dates, deliverable dates, and personnel time. Along with these details, the critical path and tasks that will require support from the PRDoH will be highlighted. This work plan will be updated bi-weekly with weekly status updates reported to the MFP Project Lead.

A proposed version of the initial project schedule is included as part of the Attachments for the scope of work.

Project Management Plan

Additionally, we will prepare a Project Management Plan, which will be a management tool to guide the project and will be useful as an informational overview for project participants and interested parties. Also, it will provide a mechanism for communicating the objectives of the study to all participants and will summarize the overall management strategy for the study, in addition to the responsibilities, authorities, procedures, schedule and budget for completion of the study.

Task 2: Background Research

In order to understand the current conditions of the system, and identify the actual and potential demand, it is important to understand the current situation in terms of infrastructure, demographics, economics, travel patterns and the existing planning framework of the elderly and disabled in Puerto Rico. To achieve this, we propose to collect and assess all relevant information from third parties and obtain first-hand information from NEMT providers, brokers, and partner agencies.

To achieve this task to its maximum extent we seek for support of the PRDoH to assist us with the initial data collection.

The primary information to collect will aim to:

- Assess the current transportation data and develop an assessment of needs and opportunities within the transportation sector.
- Identify the current transportation services challenges in Puerto Rico for the target population.
- Compare Puerto Rico NEMT brokerage models to existing ones in other states.
- Develop tools and evaluating the current state of Puerto Rico NEMT needs for the population of interest.
- Assess the current transportation infrastructure in Puerto Rico.
- Identify partner agencies for NEMT in Puerto Rico.

Task 3: Data Evaluation

Determine existing data and methods for new data recollection to fill in the current gaps needed to validate the NEMT necessities on the island.

After finishing the background research and reviewing the existing data, we will determine the gaps in data that will need to be addressed later in the next phase. Through an evaluation of the data collected in Task 2, we will list the data required to complete and strengthen the NEMT gap analysis. We have vast experience designing data collection instruments to fulfill the data needs of our projects. This experience and expertise include, but is not limited to, surveys, focus groups, and open houses. We have the proven skills and capacity to work with both quantitative and qualitative data collection methods.

Once the required data and data collection instruments are defined by our team, we will proceed to meet with the Client to assess and approve the process and proceed with the additional data collection efforts.

We will develop a preliminary geospatial database to start analyzing the information acquired.

Task 4: Stakeholder Engagement

The purpose of this task is to understand and learn the current and expected transportation needs of the transportation users in Puerto Rico, as seen by different stakeholders.

Technical Committees and Stakeholders Online Meetings/Workshop: Technical representatives from the various government offices and stakeholders (e.g. hospitals, municipalities that offers services like Paratransit, AMA with their Llame y Viaje service, private operators from medical healthcare plans, Oficina del Procurador del Paciente, Oficina del Procurador de Personas de Edad Avanzada, AARP, etc.) will meet at least once with the Consulting Team to inform and help shape the development of this transportation plan.

Our expertise in stakeholder engagement leads us to believe that there should be two rounds of engagement with stakeholders, one at the start of the research process and one after the surveys have been completed to discuss the study's findings.

Preparation of a Web Page: Since we understand the importance of maintaining the citizens informed of the progress of this project. We will develop a webpage that will be part of the PRDoH Website. This website will provide relevant and updated information about the project and its advances to anyone interested, as well as provide a space to collect useful information from citizens. The website, which would be constantly updated by the Consultant Team, can include features such as:

- A description of the project, with objectives, main activities, level of advancement and stakeholders involved and links to relevant external sources.

- Interactive map in which citizens can search for a location (eg. Municipality) to add a comment regarding their current needs, requirements, and suggestions for improvement.
- Surveys for different topics and respondent types.
- Contact information for anyone who wishes to contact the team developing the project.
- Polls and other activities which will further promote public engagement.

Deliverable:

- Project Schedule & Project Management Plan

At the end of task 1, the project schedule & project management plan will be delivered to the client. They will detail the project schedule and communication channels between the client and the Steer team during the project.

Phase II: Identify Gaps (Conduct gap analysis)

In phase 2 we will **design and implement** the survey that will be used to identify the gaps. The sample size necessary for each of the several relevant segments will be ascertained based on the population dimensioning that was completed in the phase one.

The **survey's design** will be implemented, comprising various question blocks that will enable us to learn about the attributes of the users, the features of their recent transfers to health care facilities, the assessment of the service, and the areas in need of improvement, among other topics.

The **logistics of the survey** will be developed, presenting the different ways in which it will be carried out: in person and on the web, the way the survey will be disseminated, which may be included in the Department of Health page, in order to increase the in-person sample. We commit to ensuring that the survey logistics are complete and **culturally competent**. Especially when we are fully aware of the demands of the Puerto Rican community. It is standard process for us to ensure that the survey team receives training in how to be sensitive to the respondents.

The **information will be systematized in a database**, which will contain the details of all the respondents' answers. The information will be cleaned and validated.

The tasks for phase II are listed below:

Task 5: Gap Analysis Design & Logistics

The vendor must describe how they will conduct the data gap analysis (e.g., techniques, resources, methodology) to identify the strengths and challenges of NEMT in Puerto Rico.

Cultural Competency

As part of the cultural competency aspect of this project, we have developed strong connections with the communities, and local organizations throughout the years. Being the prime consultants of the 2050 MLRTP we have developed various strategies to engage with several communities around the Island.

Engaging with the target population in a sensitive and appropriate manner is very important to us, so we will develop a comprehensive cultural competency plan that will guide our interactions with the all the participants of the survey.

Survey Methodology

A survey will be designed specifically for the indicated segments. The elderly (60 and up), those with disabilities (21 and up), caregivers, transportation providers, and the Division of Medicaid will all be given special consideration.

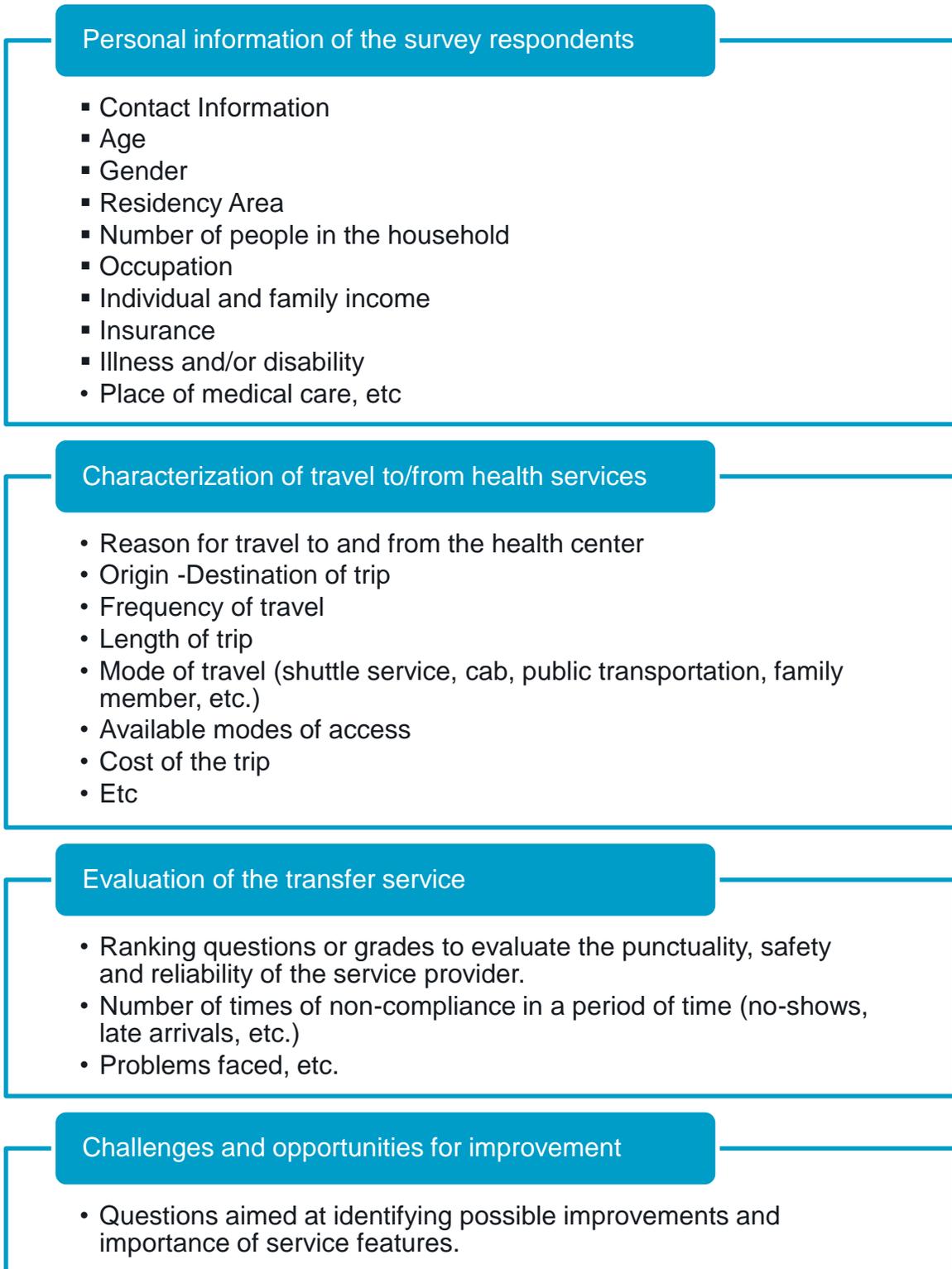
The survey will be programmed in a software (for example, Sawthooth Software Lighthouse, Line Survey, or others), which will allow for the generation of an adaptive and dynamic survey with questions appropriate to the type of respondent (segment) and the activation of questions according to the answers given.

The survey will be divided into blocks and subblocks of questions with specific objectives. An initial block of questions to identify the respondent, followed by a second block of questions to characterize the transfer service, a block of questions

to rate and evaluate the transfer service, and a block of questions to identify challenges and opportunities for improvement.

The picture below illustrates how the survey may appear for current NEMT users. We want to emphasize that this is only an example; when we complete the activities in phase I, we will extensively review the survey questions and make adjustments to fulfill the PRDoH's requirements.

Figure 2.1: Example of the proposed structure for the current NEMT user survey



Source: Steer, 2024

Task 6: Data Collection

Survey Administration

We will develop a survey that will be distributed to the segments of the population designated in task 5, in the aim to collect information about the current barriers and the mayor gaps for the NEMT. The online survey tool has been great to use to reach a wide variety of the population in a short period of time.

For this project we are envisioning using different methods to acquire the information: on-line, phone, and in-person. The survey will be conducted in person with bilingual and culturally competent interviewers. Individuals with functional diversity and people who are hearing impaired will be matched with a resource who can assist them execute the interview.

As part of the survey, the personal information of the respondents will be collected in the need of having to make any follow-up questions or interview to deepen our understanding and analysis.

Steer has vast expertise conducting island-wide surveys, and we joined forces with Infocus to gather surveys throughout Puerto Rico and the municipal islands.

Task 7: Geospatial Data Collection

- Create geospatial database of existing NEMT services used in Puerto Rico to see the municipalities that have the greatest needs as well as be able to create a geospatial analysis such as and not limited to marking the distance between the medical services used and the patients place of origin (residence).

We will prepare a geospatial database containing data on the location of health care providers including, but not limited to, medical office buildings, medical offices, medical service clinics, dialysis centers and therapy centers. This database will also evaluate the existing network of NEMT services used in Puerto Rico and geolocate their service areas. This database will include the data collected during

the survey, such as the origin and destination pairs of potential NEMT users from the survey.

Deliverables:

Survey Design Plan

At the end of task 5, a survey design plan will be delivered to the client. It will detail the survey methodology, its sample and target groups, the execution and administration, and the analysis to be performed. It will include an outreach plan considering the cultural context of Puerto Rico and the bilingual nature of the instrument.

Phase III: Record, Review, consolidate and analyze recollected data.

Phase 3 will then analyze the data gathered and provide statistics related to the various aspects of interest:

- The existing modes of transportation (offered by health insurance, family members, municipalities, etc.);
- The assessment of services (reliability, safety, travel time, waiting time, etc.);
- The availability of alternative modes (public transportation that is readily available, ease of use); etc.
- Groups and segments (gender, age, disability, frequency of transportation, location, etc.) will be used to disaggregate the statistics.

The **analysis will identify gaps in the current situation**, such as the amount of coverage of transportation services, weaknesses, efficiency, reliability, safety, needs, and potential for improvement, among other areas.

The collected information will be georeferenced to create themed maps that will graphically show the statistics and gap analysis. We propose the **development of a dashboard** to present the summary statistics of the survey and the main gap analyses. The use of the geographic information system for the elaboration of thematic maps is also being considered.

The tasks for this phase are listed below:

Task 8: Data Analysis

Vendor must describe how they will record, review, analyze, and consolidate data (see section G and H in p.11).

Data Record: The survey may be performed on a tablet using a local version of survey design (e.g. Sawtooth) and collection tools. The information gathered, both in person and online, will be saved and collated in an Excel database.

Data Review: The responses provided by the respondents will be used to compile statistics. The analyses will be aggregated or summarized using specialized software's (e.g. SPSS, Jupyter Notebook, etc.), divided into questions, respondent segments, and cross-correlations of variables.

Data Analysis: As part of the data analysis, we will review different areas such as:

- **Generation of the user's profile:** From the analysis of the respondent's information questions, it will be possible to obtain patient statistics, such as age, gender, areas of residence, income levels, level of vulnerability, etc.
- **Characterization of transfers:** trips to medical centers by area of origin, frequency of trips, who provides the transfer service, cost of the transfer, level of accessibility, etc.
- **Evaluation of the transfer service:** it will be possible to determine the rating given by the interviewees to different aspects of the service and its providers, such as levels of reliability, safety, punctuality, etc.
- **Analysis of service coverage:** identifying areas that are not served, areas that have no alternative means of transportation, user segments without accessibility to transportation modes, etc.
- **Health requirements:** patient statistics by type of treatment, levels of disability, frequency of transfers, among others.
- Cross-analysis of the above aspects.

Other Data Collection Exercises: The given task will allow us to develop different approaches for collecting additional information that could arise from the survey findings.

Deliverables:

Survey Response Findings

At the end of task 9, the survey response findings will be delivered and presented to PRDoH. The findings will be presented using MS PowerPoint and MS Word, and will include tables, charts, and visualizations to clearly represent them.

Task 9: Geospatial Analysis

The vendor must provide a geospatial analysis of the NEMT transportation data to assess where the service is most needed on the island.

Geographical Information Systems: Geographical data collected during tasks 6 and 7 will be used to perform the geospatial analyses in this task. Origin and destination data of the target population will be used in conjunction with the coverage areas from the current NEMT, transit and other transportation providers. Analyses to be performed include, but are not limited to, overlap analysis, cluster identification, and network analysis. Each of these analyses will guide the team in the process of identifying the needs and gaps of the current NEMT services at the municipal level. The analysis results will be submitted to the client through maps with the different findings and detailed description of the results by municipality.

Dashboard: Another tool that we will design and deliver during this task will consist of the development of a dashboard containing the geospatial analysis results. This tool will include interactive maps presenting the results at the state and municipal level by relevant variables. This tool is going to be vital for understanding the different results and gaps since this platform will make it easier for the user to visualize different types of information.

Phase IV: Findings and Recommendations

In phase 4, once the gaps have been identified, **proposals for improvement** will be developed, resulting in a framework for prioritizing the various segments and types of users in the transfer benefit distribution process. Similarly, measures will be provided for evaluating and qualifying the various suppliers, resulting in quality, efficiency, and compliance metrics.

We will provide support in the development of the Operational Protocol for the project by preparing a cultural competency plan and aiding in the development of the design and implementation plan. The cultural competency plan will include strategies to allow accessibility to the NEMT system for different users, regardless of language, origin, type of disability, and age. These operational planning efforts will be complemented with service delivery policies that allow accessibility to different types of users.

The final deliverable will compile the work completed in the previous phases along with the elaboration of conclusions and recommendations, which will include graphic elements for the presentation of results, such as infographics, dashboards, or/and maps.

The tasks for this phase are listed below:

Task 10: Gap Analysis Findings

Document findings and provide recommendations from gap analysis.

The findings obtained from the gap analysis will be presented in this task along with an analysis on possible points of complement with existing transportation models. Additionally, this task will present the documentation of the research and the stakeholder outreach activities performed during the project execution.

Barriers, challenges, and possible solutions.

To outline the barriers and challenges gathered from the gap analysis, a **SWOT analysis** will be performed. This exercise will be performed to provide the team with an understanding of the external and internal barriers and opportunities to the implementation of the NEMT system. The results of this exercise will be presented to the PRMP team and stakeholders to validate the concerns and suggest possible solutions from their technical perspectives. Ultimately, these inputs will be evaluated and used to enhance the recommended solutions for the NEMT system implementation.

Analysis of the current transportation models available and possible ways to complement these with NEMT program.

An analysis to identify the possible areas of complementation will be performed using the data gathered during the initial phases of the project in combination with the gap analysis findings. This analysis will compare the current transportation operations at the municipal level with the operational design of the NEMT program. Data regarding quality, efficiency, route optimization and coverage of transportation services will be assessed.

Synthesis of research and stakeholder outreach.

A report with the findings gathered from the survey, research and stakeholder outreach activities will be prepared and presented. This report will include documentation on all the stakeholder outreach activities performed including, but not limited to:

- Description of the event
- Images
- Samples of the presented materials
- Graphic summary of the findings

The second part of the report will present a synthesis of the research performed during the second phase of the project. It will contain a package with the survey material and data collected, and a technical note documenting the process that was finally employed.

Task 11: Conclusions

Outline conclusions from gap analysis.

Task 11 will present the conclusions reached from the gap analysis process and will categorize them by gap area. These gap areas will be defined after the data analysis to clearly reflect the assessed needs. The presented gap areas may include transportation quality, safety, accessibility, operation, and coverage.

Task 12: Possible Implementation Methods

Recommendation of possible implementation method (e.g. possible brokers, design, and possible funding opportunities).

Possible implementation methods for the NEMT system will be evaluated during this task and recommendations will be made based on defined scenarios of implementation. Several NEMT models will be evaluated, such as:

- In-house management model
- Managed Care Organization models
- Broker models, including statewide and regional brokers
- Rideshare model
- Hybrid models, combining multiple models

These scenarios will include cost estimates and an analysis of the infrastructure requirements.

Task 13: Implementation Roadmap

Outline potential next steps for PRMP to implement NEMT.

Selected with the NEMT Client. On task 13, we will outline the tasks required to deploy the NEMT models evaluated in the previous task. A comprehensive

roadmap for the implementation of the NEMT system for recommended model will be developed and presented to the client.

This roadmap will detail the necessary next steps to implement the NEMT system and will include the relevant stakeholders to engage with, tools to develop, and outreach activities that must occur for a successful implementation.

Task 14: Recommendations.

The final task of the project will present the final recommendations for the implementation and operation of the NEMT system in Puerto Rico.

We will provide recommendations to the NEMT Specialist regarding the development of operational criteria for the Medicaid-funded NEMT system. These criteria will include developing and designing:

Provider evaluation criteria

Evaluation criteria for NEMT providers will be determined using accessibility criteria and considering variables related to compliance with state and federal requirements, vehicle specifications, and cultural competencies.

Functional criteria for beneficiaries

To determine which potential users will benefit from the transportation service, we will develop a multicriteria analysis integrating multiple aspects of current patient characteristics.

Information on the profile of current patients will be based on the survey results. The most relevant variables to develop a prioritization or classification methodology will be selected. To do this, we will use an analytic hierarchy process (AHP), that will allow us to generate priority scales for different variables.

For the analysis we will consider social, cultural, health, and geographic variables, among others. It will be relevant to include aspects that can portray the social vulnerability of patients, level of disability, and the importance of transportation for their treatment (some treatments may present a risk of death if they are not

received, such as dialysis). Additionally, it is also relevant to consider the level of transportation accessibility to healthcare centers, including if there are public, safe, and affordable transportation alternatives.

Payment methodologies

To present the possible payment methodologies we will explore alternatives for the transaction process directly related to the recommended model or models.

Quality measures for services

Measures for the quality of the services will be assessed and recommended including, but not limited to, trip time, response rate, availability of resources (vehicles, drivers), solid organizational structure, and internal performance metrics.

Operational Protocol

We will support the client team in the elaboration of the design and implementation plan for the project of the to portray the results of the NEMT gap analysis.

A cultural competency plan for the implementation of the operational protocol will be prepared during this task. It will explain the necessary requirements that NEMT providers must comply with to offer a sensible and respectful service to all users, regardless of age, language or health condition.

Deliverable:

NEMT Gap Analysis Final Report

At the end of task 14, a final report will be delivered to the client. It will include the results obtained from the gap analysis as a compilation of all the tasks worked on during the project.

We also want to note that the team at Steer will support the client in the development of their capacity-building activities, considering the competence of the team.

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