



REQUEST FOR PROPOSAL #24-06

Mobility and Funding Assessment for the Expansion of Free and Reduced Fares

POSTED DATE: 4/1/2024

CLOSE DATE: 4/30/2024 at 11:59 p.m. CST

Submit Proposals to: ICTProjectManagement@illinois.edu

PROJECT INFORMATION

Funds: \$400,000 total (includes a required 25% cost share of \$100,000 from proposing agency)

Estimated Contract Term: 20 months

Projected Start Date: 8/16/2024

BACKGROUND

The last several years have seen growing interest in expanding programs providing free transit passes or reduced fares. Recently, Washington made transit free for youth statewide, and, locally, HB 1342 mandates the Regional Transportation Authority study extending benefits to veterans and youth. Policymakers recognize the mobility and social inclusion benefits affordable transit can provide, but agencies face financial challenges from lower ridership, growing fare evasion, and driver shortages. The proposed research will inform decisions that strike a balance and ensure additional costs/foregone revenues can be sustainably replaced.

OBJECTIVE

The objective of this research is to inform state and local decision-makers across Illinois about options for free or low-cost transit access.

A successful proposal will be a comprehensive mobility and funding assessment for the expansion of free and reduced fares in public transit systems within the state of Illinois. The study will investigate the impact of existing free and reduced fare programs on mobility and funding, assess potential expansion strategies, and provide recommendations for improved equity and service efficiency. This study will illuminate the potential benefits of fare reduction, such as improved accessibility, increased ridership, and reduced environmental impact. Additionally, it may offer a nuanced understanding of the economic implications, helping policymakers navigate budget allocation and assess the long-term sustainability of fare reduction initiatives. Furthermore, this research aids in crafting equitable policies that prioritize underserved communities, promoting accessibility and social inclusion.

RESEARCH TASKS AND REQUIRED DELIVERABLES

The proposed research will address the following tasks.

Task 1 — Conduct a statewide historical inventory of existing free and reduced fare programs.

Task 2 — Develop a methodology for estimating ridership effects and forgone revenues resulting from these programs

Task 3 — Examine the costs and societal benefits of expanding free and reduced fare offerings, including the inhibition of trip making, estimation of new ridership, and economic benefits of increased mobility.

Task 4 — Analyze funding mechanisms used in other relevant states and establish a set of comparative data.

Task 5 — Prepare a final report detailing the study's process, findings, and recommendations for funding needs of existing programs and the costs and benefits of future expansion with respect to the distinguished responsibilities of state and local governments.

INSTRUCTIONS FOR SUBMITTING A PROPOSAL

The proposal shall be prepared in accordance with the guidelines presented in Appendix A.

By submitting a proposal, potential principal investigators are acknowledging they have read and understand the IDOT/ICT [PI responsibilities and Guidebook](#) and terms and requirements under the current [IDOT/ICT Intergovernmental Agreement \(IGA\)](#)*.

Technical questions regarding the research project or RFP procedures should be submitted to the ICT Project Management team via email at ICTProjectManagement@illinois.edu within 14 days of the posting date. Technical questions and answers will be posted on ICT's website as they are received.

* A new IGA will be effective July 1, 2024. Terms and conditions are not anticipated to change.

SPECIAL CONDITIONS FOR REVIEWING PROPOSALS AND AWARDING ICT FUNDS

Please note that the following conditions will be applied when reviewing all received proposals and in awarding ICT funds:

- 1) Preference will be given to Illinois universities (both public and private) when multiple proposals from this solicitation are reviewed and have identical scores.
- 2) The award of this project is contingent upon the availability of funds at the time of award.

APPENDIX A: Guidelines for Preparing Proposals for the Illinois Center for Transportation

Please use the following format when submitting Illinois Center for Transportation proposals for consideration. Proposals should be a maximum of 15 pages (excluding the cover page, itemized budget, budget justification and optional appendices) with a minimum 11pt font, standard margins, and in Adobe PDF file format.

1. Cover Page

Use the cover page found [here](#).

2. Research Plan

Clearly and concisely address the proposed approach for solving the issue described in the problem statement. The research plan should be subdivided into the following sections:

(a) Introduction, Including Research Objective

Introduce the proposal and provide a concise overview of the research approach. Outline the objectives of the research project and explain the questions that will be answered by the research.

(b) Research Approach/Work Plan

Include details of the research project and strategies to accomplish the project objectives. Itemize the tasks and provide clear explanation of the research approach, deliverables, and identify the research team lead for each task.

(c) Anticipated Research Results

State the anticipated research results and deliverables.

(d) Expected Implementable Outcome(s)

All IDOT/ICT research is expected to be implementable. Describe what implementable outcomes (e.g., specification, test, recommendations, etc.) are anticipated that will facilitate implementation of the research results.

3. Qualifications and Accomplishments of the Research Team

Identify who will perform the research and provide a brief explanation of each researcher's qualifications and related research efforts.

4. Other Commitments of the Research Team

Outline the other commitments of the research team to demonstrate the ability to fulfill the commitments of the proposal.

5. Facilities and Equipment

Describe the facilities and equipment available to conduct the research.

6. Timeline Requirements

Include a timeline of the research project’s tasks in this section. Describe the required time to complete the research, including final report preparation, ICT’s editing process, review of the report by the Technical Review Panel, and publication of the report. Please note the final report must be submitted in Section 508 compliant format at least three months before the project’s end date. Below is an example of a project timeline.

Project Milestones (assuming an August 16 Start Date, and a 24 month project)	2024					2025								2026											
	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8
1 Kickoff Meeting	█																								
2 PI conducts Research	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
3 PI writes DRAFT report																			█	█	█	█	█	█	█
4 PI Submits Final DRAFT report to ICT for editing																							█	█	█
5 ICT Preliminary editing phase																									
6 PI/TRP editing phase																									
7 Final editing phase																									
8 Report published																									
(Quarterly Progress Reports Due)		█			█				█				█				█				█				█
(TRP Meetings)		█			█				█				█				█				█				█

7. Itemized Budget

Provide an itemized project budget including the cost of personnel, consultants, subcontracts, equipment, materials, travel, indirect costs, and cost share.

A minimum 25% of the total project budget must be cost share from the proposing agency. Under the new IGA effective July 1, 2024, the indirect cost rate used for institutions with a federally negotiated F&A rate cannot exceed 42.97% of the modified total direct costs. If the proposing agency does not have a federally negotiated rate, a 10% de minimus rate must be used.

Subaward costs from outside the proposing agency cannot exceed 50% of the total project budget without prior approval.

A part of the cost share requirement may be fulfilled using unrecovered indirect costs. Any proposal submitted by an agency outside of the University of Illinois system that plans to use unrecovered indirect cost as cost share must submit a request for approval to IDOT/Federal Highway Administration. More information on this letter will be provided if a proposal is selected for funding.

Please utilize ICT’s budget templates when submitting a proposal: [UIUC Budget Template](#) and [Subawardee Budget Template](#).

8. Budget Justification

Include a budget justification that explains the itemized budget in narrative form. The budget justification shall provide sufficient detail so there is a clear understanding of how

the project costs were calculated and why they are necessary. The narrative discussion of the project cost categories and related line items should be presented in the same order as they appear in the itemized budget. If the project requires the purchase of equipment, out-of-state travel, or out-of- or in-state conference registration/attendance expense, please list and explain here.

*Under the terms of our IGA, equipment is defined as any tangible or intangible product, having a useful life of **two years or more**, an acquisition cost of at least **\$500**, and solely purchased for use in the IDOT-ICT project. Equipment purchased on IDOT-ICT projects is to be returned to IDOT at the conclusion of the project, unless otherwise agreed upon. Equipment purchases on IDOT-ICT projects must have a **signed** pre-approval.*

*Travel expenses should include, but are not limited to, travel to TRP meetings, travel for testing / sampling, etc. Any out-of-state travel expenses and **any** conference expenses charged to the project must have a **signed** pre-approval.*

Inclusion of equipment and travel expenses in the project budget and workplan does not meet the requirement for pre-approval. Signed, pre-approval request forms must be submitted prior to purchase of any equipment or travel meeting the above criteria to be considered allowable expenses on the project. Expenses not meeting this requirement may not be reimbursed.

9. Cooperative Features (if appropriate)

If assistance or cooperation is required from other agencies, public or private, to complete this proposed research, describe the plans for securing this assistance.

10. Appendices (if appropriate)

References or any additional materials deemed necessary may be provided here.