



October 15, 2019

Canadian Urban Transit Association  
RFP October 2019

FOR: CUTA's Strategic Plan 2021-2023

CLOSING: October 18, 2019 at 16:30 (EST)

Questions and Answers:

1) When will the successful bidder be notified?

All bidders will be notified on October 23<sup>rd</sup> whether you are selected or not. A detailed report is expected on the methodology and timeline to completion of the CUTA Strategic Plan" for presentation at the Annual Conference in Calgary on November 9 and 10, 2019.

2) If your firm wins, will this presentation be given by you in person?

No, you can provide your presentation in advance and we will schedule a conference call with our Executive Committee on November 9<sup>th</sup> between 1:00PM and 4:00PM (Mountain Time) and with our Board of Directors on November 10<sup>th</sup> between 1:00PM and 4:30PM (Mountain Time).

3) We have requested a survey of CUTA's Executive Committee, Board and Senior Management to "narrow the focus". Is this survey expected to occur after the Annual Conference in Calgary on November 9-10?

Yes. Details for the November presentation will be provided once contract is awarded.

4) Who will make the final decision on whether a survey of members will be required?

A survey to are members will be sent following the feedback from the Board of Directors and Executive Committee.

5) Will there be an opportunity between the February 2020 Executive Committee meeting and the May 2020 Board meeting to have a workshop with our Board to brainstorm about strategic priorities, critical success factors and other key elements of the new strategic plan?

There will be an opportunity to have a .5 day to a full day workshop with the Executive Committee in Ottawa on February 19<sup>th</sup> or 20<sup>th</sup>, 2020. Other opportunities will be explored with the chosen vendor.

- 6) CUTA's current Strategic Plan includes a Vision, Mission, CSFs and "foundational enablers". Is it expected that the new plan will contain these same elements or are you open to re-examining these elements and possibly making changes?

The process of getting input from the Board of Directors will be critical. The specifics of what CUTA will need to be revisiting regarding the vision and critical success factors will be worthwhile discussing with the Executive Committee and Board of Directors.

- 7) Please clarify the term "causal factors" on page 1 (iv).

Any factors not identified by CUTA or any environmental factors that would have an impact (change of government, etc.).

- 8) What is the location of CUTA's Annual General Meeting in May 2020?

The AGM will take place in Ottawa, ON. Date to be confirmed but currently May 9 – 10<sup>th</sup>, 2020.

- 9) What is CUTA's budget range?

CUTA's budget is up to 30k. Any additional work not listed in the RFP should be listed separately with cost of each item for consideration.

- 10) How many contacts will CUTA be supplying for the portion of the survey?

CUTA will provide all contact information for the Executive Committee, which is comprised of 13 members, the Board of Directors, comprised of 45 members. The CUTA membership has approximately 5,000 active members and you will be provided with a list of who should be surveyed.

- 11) What are the role expectations regarding the working session?

The successful bidder will be expected to facilitate the session based on feedback from work done between November 2019 and February 2020.

- 12) What existing data could be made available from CUTA?

CUTA will share the current strategic plan and any supporting documents.

- 13) Any movement with the timeline to submit a proposal?

No, due to the timing of the September meeting with the Executive Committee and the upcoming meetings in November.

- 14) Are travel expenses included in the 30k?

The travel expenses should be included or listed separately as you see fit.