

## **Request for Proposals**

### **CUTA Strategic Plan 2021-2023**

**October 2019**

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#### **INTRODUCTION**

CUTA is hereby forwarding its Request for Proposals for the services described below. The objective of the project is to conduct an in-depth study on current and future conventional goals of our members to develop a comprehensive strategic plan to guide CUTA through 2021-2023.

#### **BACKGROUND**

CUTA is in the final 15 months of its current strategic plan with a completion date of December 31, 2020. The current plan is based on an environment assessment done in 2010 of an industry that has experienced rapid change in the past few years and developed with an executive team that has experienced change in key areas (CEO, Director of Finance, Director Communications)

#### **STRATEGIC PLAN OBJECTIVES**

CUTA recognizes that the transit environment is rapidly evolving environment. The development of the next strategic plan should align with the needs of the current players in this complex environment. This includes transit systems, business members and government members at all three levels.

The strategic plan should meet the following objectives:

- i. To provide a framework of three **Critical Success Factors** that will enable CUTA to meet the changing needs of transit.
- ii. Key deliverables related to each CSF's assigned to key management staff
- iii. Analysis of current environment through survey of Executive Committee, Board and members.
- iv. Based on causal factors, identify management strategies and tools to achieve CSF's.

#### **Deliverables**

**All final products and results from the deliverables below will be considered as property of CUTA.**

### **1) Methodology and Timeline**

There is an expectation that the successful firm will provide a detailed report on the methodology and timeline to completion of the CUTA Strategic Plan. This report will be accompanied by a power point presentation that will be shared with the CUTA Executive Committee and Board at the Annual Conference being held this year in Calgary, Alberta on November 9<sup>th</sup> and 10<sup>th</sup>, 2019. The successful candidate has the option to attend and present in person, however any accompanying expenses should be factored into the final bid. CUTA secured hotel rates will be available for the successful bidder if required.

### **2) Survey of Executive Committee, Board and Senior Management**

The successful bidder will conduct a survey of the Executive Committee, Board members and senior management of CUTA to determine key issues and objectives for the industry. This will help to narrow the focus for development of the CUTA Strategic Plan. While members are not included in this survey, there may derive a need to survey members as well.

### **3) Working Session with Executive Committee**

The successful bidder will attend the February 2020 Executive Committee meeting, in Ottawa, ON, to further glean insight and direction from the CUTA executive. This will be a working session that will help focus the development of the 2021-2023 strategic plan with a list of potential CSF's and deliverables.

### **4) Presentation at the CUTA AGM in May 2020**

Final review and presentation to CUTA Board and attending members in May 2020. While some further refinement may happen after this date, the intent is to have the plan in its final stages for implementation late 2020. This date is relevant because any deliverables that may require budget allocations will be identified in time for the preparation of CUTA's 2021 budget.

## **5) Work Plan**

A work plan will be provided by the consultant that will outline a series of required meetings to be held with CUTA's Statistics Sub-committee to provide regular updates on the progress of the project.

## **6) List of Interviewees**

A contact list of all surveyed participants will be provided by the consultant, if applicable.

## **INFORMATION FOR SUBMISSIONS**

**One electronic copy**, Portable Document Format (PDF), of a submission is to be provided and must not exceed 10 pages, excluding relevant appendices, résumés and project examples. Submissions shall include the following information:

### **1. General**

- a) Name, address, telephone number, and e-mail address of the consultant
- b) Identification of any and all parties in a joint venture, including sub-consultants

### **2. Qualifications**

- a) A general description of the qualifications of the firm must be provided
- b) Identification of members to be assigned to the project team, including any sub-consultants and relevant experience

### **3. Project Experience**

- a) Brief documentation of at least 3 significant projects of similar size and scope, with project description and proposed project team members' involvement and their respective roles, together with a brief description of any other projects of relevance, must be provided. Samples of relevant previous work are useful in demonstrating this experience and may accompany the submission in electronic format.
- b) Project experience should be mapped specifically to the personal experience of individuals proposed to work on the assignment.

#### **4. Project Methodology**

- a) Documentation of proposed outline to undertake and complete the assignment. This should include, but is not limited to, methodology and resources outlined in the scope of work. This outline should also include proposed data sources and the extent to which data will be needed from CUTA membership to complete the terms of the project.

#### **5. Team Organization**

- a) Organizational structure
- b) Responsibility matrix describing the role and accountabilities of each team member and their relevant experience
- c) Resource allocation table (proportion of hours by individual staff members)

#### **6. References**

- a) Three (3) references of clients, which must include: company name; contact name (position); telephone number(s) and e-mail address(es). For each reference, please include the title of the project worked on for the reference along with a brief project description. Please do not include anyone as a reference who you have worked with on a project previously completed for CUTA.

#### **7. Costing**

- a) Proponents answering this Request for Proposal should provide a fixed cost solution, with a maximum budget of \$30,000 for the entire project
- b) The fee proposal shall be provided with sufficient detail as to describe the type and level of effort to be performed for each task
- c) If alternate methodologies are proposed, proponents should cost each of them separately and highlight any differences

#### **8. CUTA's Role**

- a) Responsible for project management
- b) Organize project steering committee who will be engaged and provide feedback at every milestone of the project
- c) Provide any existing CUTA transit system data that could assist the research project
- d) Provide meeting support between all working groups involved in the project
- e) Handle administrative approvals

## 9. Proposed Payment Schedule

Progress payments will be made as follows during the project.

1 <sup>st</sup> Payment	Twenty-five percent (25%) upon award of the contract
2 <sup>nd</sup> Payment	Twenty-five percent (25%) upon completion of February 2020 consultation
3 <sup>rd</sup> Payment	Twenty-five percent (25%) upon the presentation at CUTA AGM in May 2020
Final Payment	Twenty-five percent (25%) upon the delivery of the final report and conduct a session/webinar to present final report to Senior Management and Executive Committee/Board

## 10. Milestone Schedule

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| a) Release of Proposal:                 | October 7 <sup>th</sup> , 2019                     |
| b) Q&A for all Bidders                  | October 14 <sup>th</sup> , 2019                    |
| c) Submission Date:                     | October 18 <sup>th</sup> , 2019                    |
| d) Notification of Award:               | October 23 <sup>rd</sup> , 2019                    |
| e) Presentation Dates:                  | November 9 <sup>th</sup> & 10 <sup>th</sup> , 2019 |
| f) Executive Committee working meeting: | February 21, 2020                                  |
| g) Draft Final Report:                  | April 30 <sup>th</sup> , 2020                      |
| h) Presentation to board:               | May 2020   |

### Q&A Meeting Details:

#### CUTA RFP Q&A

Mon, Oct 14, 2019 11:00 AM - 11:45 AM EDT

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## SUBMISSION GUIDELINES

Proposals will be accepted until December 6<sup>th</sup>, 2017 16:30 EST.

You will receive an acknowledgement of receipt email by 17:00 EST. If you do not, contact Angela Murray (amurray@cutaactu.ca, 416-365-9800 x106) immediately.

Proposals are to be submitted in electronic form as a Portable Document Format (PDF) to:

Angela Murray  
Director, Finance & Operations  
Canadian Urban Transit Association  
Tel: 416-365-9800 x106  
E-mail: amurray@cutaactu.ca

This initiative requires qualified individuals to perform the services as outlined. Only **English** proposals from those with demonstrated related experience and expertise will be considered.

## EVALUATION CRITERIA

Responses will be evaluated and ranked using the following criteria and weighting:

<b>Evaluation Criteria</b>	<b>Points</b>	<b>Weight</b>	<b>Sub-Total</b>
1. Project Plan and Methodology	0 to 10	4.0	40
2. Project Team and Experience	0 to 10	2.5	25
3. Resource Allocation	0 to 10	2.0	20
4. Project Control	0 to 10	1.0	10
<b>Non-Member Total</b>			<b>95</b>
5. CUTA Membership in good standing over the past 5 years*			5
<b>Total</b>			<b>100</b>

**\*if you are unsure of your membership status, please contact our membership department at [membership@cutaactu.ca](mailto:membership@cutaactu.ca)**

**In the event of two or more submission having an identical score, the submission with the lower cost estimate will be given preference.**

**Additional points will be awarded based on the number of optional causal factors that will be explored in addition to the mandatory causal factors. Specify clearly in your submission which optional factor(s) you will be exploring.**

## **1. Project Plan and Methodology**

- Describe the approach to the provisions of the project services. Consideration is to be given to whether the team has:
  - Sufficiently broken down tasks so that specific resources may be identified
  - Thoroughly understood the project requirements
  - Demonstrated a comprehension of the challenges and risks
  - Ensured that CUTA receives the best overall value
  - Proponents must outline the methodology for design and administration that will ensure successful completion of the project
  - Proponents must clearly identify all services included in the submission along with any optional, excluded or services assumed to be provided by others
  - Proponents shall identify major issues, challenges and risks associated with the project (if applicable)

## **2. Project Team and Experience**

- Describe the composition, capabilities and management of the proponent's project team. This should include the suitability, commitment and availability of team members who will be critical, with details on:
  - Relevant experience of team as a whole
  - Relevant experience of team members individually
  - Relevant experience in the area of study
- Submission must identify which sub-consultants or specialists (if required) will be used and what their roles will be
- Submissions shall identify and provide an outline of the availability of project management staff and key personnel responsible for implementation of the project

## **3. Resource Allocation**

This describes the amount of time, effort and cost to be spent on each deliverable

- Submission shall indicate the appropriate allocation of skills and level of effort required of team members according to the work-plan for all phases of the work
- A spreadsheet showing the allocation of all staff hours (including sub-consultants) by individual for each project task is required

## **4. Project Control**

- Submission should describe an effective project management plan that will ensure cost, schedule, quality, communication and risk management needs are met
- Cost and project management (monitoring, reporting and control) techniques should be used that will be used during the project must be presented

## **5. CUTA Membership**

- A 5-point bonus will be assigned to proponents who have been a member of CUTA in good standing for at least 2 years prior to contract award

### **Additional Notes**

- Costs associated with the preparation of the proposal are the sole responsibility of the proponent and CUTA shall neither bear nor incur liability for such costs.
- Proposals received after the due date will **not** be accepted. Proposals are considered received upon reaching our offices (virtually – electronic copy by email). CUTA assumes no liability for difficulties experienced in transmission. Electronic submissions will receive acknowledgments via email. If no acknowledgment is provided regarding the submission by 4:00pm on the day of submission then proponents must contact CUTA immediately.
- Proposals will be evaluated by an Evaluation Committee composed of representatives from CUTA’s Transit Ridership Trends Research Steering Committee.
- Any errors or inconsistencies in the Proposal shall be subject to CUTA’s interpretation. CUTA’s right to accept or reject any or all proposals, whether they conform to the Proposal documents or to cancel the Request for Proposal at any time prior to the Notification of Award is expressly reserved without liability to CUTA.
- At its discretion, CUTA reserves the sole right to discuss or clarify the Proposal of a proponent in order to satisfy itself as to the intent of a proposal. Proposals will be reviewed and may be short-listed for an interview.