

*To inspire and influence the evolution of integrated urban mobility*

**Request for Proposals**

Transit Scheduling and Runcutting Level 1

November 2021

**INTRODUCTION**

CUTA is hereby forwarding its Request for Proposals for the services described below. The objective of the project is to refresh CUTA’s existing introductory course on the basics of transit scheduling and runcutting, which will be delivered to transit industry professionals who are newly undertaking responsibilities related to the field.

**BACKGROUND**

Over the past year CUTA has evaluated its existing learning programs and has determined that the course content for transit scheduling and runcutting requires updates and revisions tailored to a virtual learning environment.

**OBJECTIVES**

To consult, as a subject matter expert, on the topics proposed in the course outline and conduct research to assist CUTA staff with the design and development of a refreshed introductory course on transit scheduling and runcutting.

The course content will cover the following topics:

*\*Subject to change based on course development and input from awarded party*

* Introduction to the scheduling process
* Introduction to scheduling building and blocking
* Additional scheduling concepts
* Introduction to runcutting
* Advanced runcutting

**DELIVERABLES**

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

1. **Literature Review**

The literature review will provide a look and understanding of research and studies that has already been done about transit scheduling and runcutting practices. The literature review should look at, but is not limited to, existing course materials, past CUTA studies, ongoing projects, and any other relevant studies completed by other agencies and North American research centres. It should be noted that the literature review should advise the content to be developed for each of the course modules.

1. **Consultation Duties**

CUTA is looking to develop a virtual introductory course on the concepts of transit planning delivered in 5 learning modules. The contracted party will serve as a subject matter expert by gathering research, data, and consult with CUTA staff on the design and development of a virtual introductory course. All course content is to be delivered in English. CUTA will establish a working group composed of committee members that will review and provide feedback on the course outline as well as the content in each module. A working meeting will be established for the review and feedback activities of each module.

Content for each module will include:

* Learning objectives
* Independent and group assignments
* Evaluations to check for learner understanding
* Images and infographics to support course content
* Supplementary learner materials

**Module 1: Introduction to the Scheduling Process**

* Overview: This module will focus on an introduction to the scheduling process, including service policies, run-time calibration, transit algebra, service adjustments, run time variations, and service planning considerations.

**Module 2: Introduction to Scheduling Building and Blocking**

* Overview: This module will focus on an introduction to scheduling building and blocking, including service patterns, cycle time, trip building, schedule adjustments, deadheading, and blocking trips.

**Module 3: Additional Scheduling Concepts**

* Overview: The module will focus on additional scheduling concepts including headway smoothing, deadheading vs. in service operation, deadheading solutions, and optimizing blocks.

**Module 4: Introduction to Runcutting**

* Overview: This module will focus on an introduction to runcutting, including the runcutting process, constraints, workplace requirements, steps to effective runcutting, timed transfers, block relieving, rostering, and ten steps to scheduling service.

**Module 5: Advanced Runcutting**

* Overview: This module will focus on more advanced runcutting concepts including timed transfers, operator meal breaks, compressed work weeks, computer assisted runcutting and rostering / day off allocations.

1. **Post Development Support**

Up to 10 hours of post implementation support over a period of 6 months to answer any inquiries received from learning participants. CUTA will receive the inquiries and forward them to the awarded party to provide subject matter expertise.

1. **Course delivery facilitation (optional)**

If facilitation is of interest, bidding parties are encouraged to submit a request to facilitate the course. Please include facilitation costs and CV in your submission. All submissions to facilitate the course will be reviewed separately from the rest of the RFP submission. Please note: Should a party be awarded the consultation duties of the RFP; they will not necessarily be awarded the facilitation portion.

**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**

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

**2. Qualifications**

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

**3. Project Experience**

1. 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.
2. Project experience should be mapped specifically to the personal experience of individuals proposed to work on the assignment.

**4. Project Methodology**

1. 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.

**5. Team Organization**

1. Organizational structure
2. Responsibility matrix describing the role and accountabilities of each team member and their relevant experience
3. Resource allocation table (proportion of hours by individual staff members)

**6. Costing**

1. Proponents answering this Request for Proposal should provide a fixed cost solution, with a maximum budget of **$40,000** for the entire project
2. The fee proposal shall be provided with sufficient detail as to describe the type and level of effort to be performed for each task
3. If alternate methodologies are proposed, proponents should cost each of them separately and highlight any differences

**7. CUTA’s Role**

1. Responsible for course design and development
2. Responsible for project management
3. Organize working group who will be engaged and provide feedback of the project
4. Provide any existing CUTA transit system data that could assist the research project
5. Provide meeting support between all working groups involved in the project
6. Handle administrative approvals

**8. Proposed Payment Schedule**

Progress payments will be made based on the sign off of deliverables as approved by CUTA.

|  |  |
| --- | --- |
| 1st Payment | Thirty percent (30%) upon delivery and review of Literature Review |
| 2nd Payment | Thirty percent (30%) upon delivery and review of research for course content |
| 3rd Payment | Thirty percent (30%) upon finalization of course development consultation |
| 4th Payment | Ten percent (10%) upon delivery of post implementation support |
| 5th Payment (optional) | Facilitation fees (if awarded party is chosen to facilitate the course) |

**9. Milestone Schedule**

1. Release of Proposal November 4
2. Pre-submission Bidder’s Virtual Q&A November 11\*
3. Submission Date November 26
4. Notification of Award December 8
5. Literature Review Submitted January 7
6. Delivery of research content April 15
7. Consultation of developed content May 13

*\*Contact Sarah Ingram (*[*ingram@cutaactu.ca*](mailto:ingram@cutaactu.ca)*) to obtain log in credentials*

**Bidder’s Virtual Q&A**

Bidding parties that have questions regarding the RFP, must submit them in writing no later than Tuesday November 9th, 2021, 16:00pm, EST.

Questions can be forwarded to Sarah Ingram ([ingram@cutaactu.ca](mailto:ingram@cutaactu.ca))

All questions will be addressed during the Pre-submission Bidder’s Virtual Q&A on Thursday November 11th, 2021.

**SUBMISSION GUIDELINES**

Proposals will be accepted until November 26, 2021, 16:00 EDT.

You will receive an acknowledgement of receipt by email. If you do not, contact Sarah Ingram ([ingram@cutaactu.ca](mailto:ingram@cutaactu.ca) ) immediately.

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

[ingram@cutaactu.ca](mailto:ingram@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:

|  |  |  |  |
| --- | --- | --- | --- |
| **Evaluation Criteria** | **Points** | **Weight** | **Sub-Total** |
| 1. Project Plan and Methodology | 0 to 10 | 2.0 | 20 |
| 2. Project Team and Experience | 0 to 10 | 5.0 | 50 |
| 3. Resource Allocation | 0 to 10 | 1.5 | 15 |
| 4. Project Control | 0 to 10 | 1.0 | 10 |
| **Non-Member Total** | | | **95** |
| 5. CUTA Membership | | | 5 |
| **Total** | | | **100** |

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

**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

**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.
* 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 or not 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.
* All course design/content will be the exclusive property of CUTA. In the possession of CUTA, access to the course design/content shall be in accordance with CUTA policies.

**Addendum - Frequently Asked Questions**

**Q:** The descriptions of modules document appear to be scrambled. Please provide clarification on the module descriptions.

**A:** The descriptions of the modules were provided from an existing course that CUTA previously delivered. They have been provided for context. They are not necessarily going to be the exact modules that are included in the refresh. These are entirely open to collaboration in the design and development of the course, so we can evaluate those at a later date.

**Q:** Please clarify the role of CUTA and the awarded party when it comes to the design, development, and research part of the RFP.

**A:** CUTA will be leading the instructional design of the course. The awarded party will mainly be responsible for research; however, we will be working together to ensure the design and flow of the modules/course is presented in a logical manner for our learners.

**Q:** The requested resource allocation, effort by task and related tables/information are often best displayed in a large table/matrix that fills an entire page. Can such information be provided in an appendix, or should it be included within the requested 10-page limit?

**A:** An appendix can be used for supplementary material that can help support your submission. However, any key information that is being asked in the RFP is required to be included within the 10-page limit.

**Q:** Can larger page sizes (such as 11x17) be included within the 10-page limit to display tables or other graphics that do not fit well on the more conventional 8.5x11 pages?

**A:** Graphics or tables that are better displayed on larger sized pages (i.e., 11x17) can be included in the 10-page limit.

**Q:** Does the maximum budget indicated on page 4 include or exclude taxes?

**A:** The maximum budget excludes taxes.

**Q:** We understand that CUTA already has a learning management system/virtual learning delivery platform. Please share what product this is and provide a summary of the key features included within CUTA's license.

**A:** WBT TopClass LMS. CUTA’s LMS is used to host e-learning course content.