

n-catt



**National Center
for Applied Transit
Technology**

Request for Proposals:

Consulting Services to Develop a Software Guidebook: Pathways to Affordability and Interoperability for Small Transit Agencies and Their Partners

Issue Date: September 8, 2020

Deadline for Submissions: September 30, 2020

Consulting Services to Develop a Software Guidebook: Pathways to Affordability and Interoperability for Small Transit Agencies and Their Partners
Request for Proposals
RFP Number: 38715RFP 202

What This Is

The Community Transportation Association of America, through its National Center for Applied Transit Technology (N-CATT), is soliciting proposals from consulting firms to develop a Software Guidebook: Pathways to Affordability and Interoperability for Small Transit Agencies and Their Partners.

Interested parties must follow the instructions and format set forth in this Request for Proposals, for which responses are due no later than 5:00pm Eastern Time on September 30, 2020.

About N-CATT

The National Center for Applied Transit Technology's (N-CATT) goal is to improve and make more efficient small-urban, rural and tribal transit service by assisting local transit agencies in understanding, selecting, and otherwise planning to incorporate new technology into service. N-CATT helps transportation agencies, managers, and decision-makers, such as board members or public officials, identify promising technologies, practices, and opportunities that accomplish agencies' goals or resolve particular challenges.

The recent burst of technology-based innovations in transportation has largely focused on dense urban areas. N-CATT seeks to spread the benefits of these developments to smaller transportation agencies that lack the resources and capacities of large-urban systems to research, analyze, and test new products that could enhance their services. This includes educating system managers and helping them to encourage influential stakeholders to support needed technological advancements.

Among its activities in 2020, N-CATT is developing and producing a variety of documents and other products to achieve its goals. These include a Promising Practices Guide, a “procurement playbook,” and an assortment of topical white papers, webinars, podcasts, and factsheets.

Overview of the Software Guidebook: Pathways to Affordability and Interoperability for Small Transit Agencies and Their Partners

The “**Software Guidebook**” is intended to be a document with chapters (each approximately 10-15 pages in length, excluding references, appendices, charts, or images) that define the following topics, what is the current state of practice, what advances are being made, and examples of each (preferably in the US, but internationally as well):

- Software as a Service
- Open Source Software
- Software Training for Staff and Partner Organizations
- Software Upgrading
- Software Interoperability
- Recommended Exceptions to Prioritizing Software Affordability and Interoperability

Each of these chapters should be written as a stand-alone guide to its topic with appropriate examples featured and references to related text or chapters elsewhere in the Software Guidebook.

Scope of Work and Project Timeline

To develop the Guidebook described above, CTAA anticipates the selected consultant will perform the following steps:

1. Prepare an outline rubric to define what types of things are likely to be included as recommended software selection and practices that are affordable and allow for interoperability, a suggested format for presenting these practices in a document, and a methodology for identifying and profiling the promising practices to be included in the Guide. Secure CTAA’s concurrence on these items before proceeding. ***This task is to be completed within 10 business days from the date that CTAA gives its selected consultant notice to proceed.***
2. Using the methodology accepted by CTAA in the previous step, (a) conduct electronic “field work” or other information gathering, and (b) compile the practices to be profiled. This compilation will include any typology or other organizing framework that the consultant and CTAA have identified as appropriate to the set of practices being profiled, will include any indexes or summary analyses that help assure the applicability and replicability of the profiled practices, will contain such screenshots, charts, photographs or other images that help present the practices in understandable and replicable fashions, and will include an executive summary that is useful as a freestanding document. A near-final draft of this compilation is to be

presented to CTAA as an editable Microsoft Word document. ***This task is to be completed by December 9, 2020.***

3. Based on a review by CTAA (and possibly by FTA staff, as well), the consultant (a) will prepare a final version of the Software Guidebook, (b) will adapt the finalized executive summary as a freestanding fact sheet on the state of the practice and trends in software affordability and interoperability for small transit agencies and their partners in rural, small-urban and tribal areas, ***and*** (c) will create a PowerPoint slide deck from the Software Guidebook's contents that will be used as the principal element of a forthcoming N-CATT webinar presentation. ***This task/deliverable is to be completed and submitted by January 2021.***

Overall Project Timeline

- September 8: Request for Proposals (RFP) is issued
- Through September 17: Questions about this RFP may be submitted to carpenter@ctaa.org. Responses to questions will be compiled into one document and posted to the N-CATT website as an addendum to this RFP.
- September 30: Deadline for consultants to submit proposals.
- October 7: CTAA selects a consultant, proceeds to negotiate and execute a contract with the selected consultant.
- October 23: Anticipated completion of Task 1, as detailed above.
- December 9: Anticipated completion of Task 2, as detailed above.
- January 8: Anticipated completion of Task 3, as detailed above.
- January 2021: At a date to be determined, the consultant may be asked to co-present an N-CATT webinar on software practices, discussed above, in applying technology among rural, small-urban and tribal transit agencies, using the PowerPoint slide deck developed in Task 3(c), above.
- February 14: Conclusion of consultant's work.

Price

Because of the short duration of this project's period of performance, CTAA intends to execute a fixed-price contract with the selected consultant. Unless negotiated differently to both parties' satisfaction, the term of this contract would be for a single payment to be made to the consultant upon completion and acceptance of all work and work products.

Proposal Requirements

CTAA will accept and review proposals that contain the following information:

- 1) A 1-page cover sheet with:
 - a. Proposer's name / Firm Name
 - b. telephone number,

- c. email address,
 - d. street address, and
 - e. A one-paragraph summary abstract of their proposal that states (i) their corporate qualifications to perform the indicated work (one sentence), (ii) how they intend to approach the indicated work (maximum of three sentences), (iii) the names, titles, corporate affiliations and pertinent experience of all individuals the proposer intends to have conduct the indicated work (one sentence per individual), and (iv) the price for which the proposer is prepared to perform this work.
- 2) A narrative of no more than one page in length that demonstrates the proposer's understanding of how rural, small-urban and tribal transit systems are – or could be – employing software to help achieve their goals and missions.
- 3) A narrative of up to five pages in length that explains – in sufficient detail – how the proposer would carry out the three tasks detailed in the above scope of work.
- 4) A narrative of no more than one page that presents the proposer's experience and qualifications in a manner that demonstrates their ability to conduct work similar in nature and scope to what is requested, and to produce timely work products that CTAA will find not just acceptable, but exemplary. Proposers may supplement this portion of their submission with samples (totaling no more than 5 additional pages) or links to on-line products they have created that are similar in nature to what CTAA is seeking in this solicitation.
- 5) A staffing plan that includes:
 - a. A narrative of no more than two pages in length that names the individuals who will carry out this work, briefly explaining each person's role(s) in the project and identifying which individual will be CTAA's principal point of contact concerning the work to be performed,
 - b. A table that details – by task – the number of staff-hours each individual is projected to spend on this project, and
 - c. For each individual being proposed by this consultant, a one-page resume or CV that describes that individual's qualifications and experience and summarizes previous work performed by the individual that is relevant to this solicitation.
- 6) Three references from relevant projects, as well as contacts (names, email addresses, and phone numbers) with whom N-CATT staff may communicate to discuss consultant's skills and experience relative to this RFP.
- 7) Statement that the consultant has legal authority to work in the United States.
- 8) Statement that the consultant is not debarred or suspended from contracting with the federal government
- 9) Given the duration and scope of this project, CTAA does not anticipate proposals from teams of more than one consulting firm or entity. However, if any of the individuals being proposed are

not employees of the firm submitting this proposal, an acceptable proposal must include a letter or other signed statement from the submitter’s proposed partner(s) agreeing to be included in this proposal, and the proposal must include items (4) through (8) from the above list for every proposed subcontractor or other external partner that is included in this proposal. If the proposer has roles for which some portion of the staffing is “to be determined,” the above staffing plan must include a convincing explanation for how the proposer will address that staffing need without jeopardizing timely and satisfactory completion of the work being proposed.

- 10) Three writing samples, preferably that are similar in type or topic to that described in this RFP.

Disadvantaged Business Enterprise Participation

CTAA is not required to have any specific goals for “DBE” participation in this or any other of its contracting opportunities. Nonetheless, if more than 50 percent of the staff-hours proposed to be spent by employees of a certified DBE, that proposal will receive additional consideration, as detailed under “Selection Criteria,” below.

Selection Criteria and Process

N-CATT staff will review the submitted statements of qualifications that are received at or prior to 5:00pm (Eastern Time) on September 30, 2020. N-CATT staff will contact the references listed in each responsive consultant’s submission of qualifications, but will not engage in any other communication with the proposer or their employees or proposed partners prior to making its decision.

In reviewing consultants’ submissions to this RFP, N-CATT will apply the following selection criteria:

Understanding of how technology is – and can be – deployed among rural, small-urban and tribal transit systems.	25 points
How the consultant proposes to carry out the described work to CTAA’s satisfaction within the indicated time frame and within the consultant’s proposed budget.	25 points
Proposed staffing plan, in terms of its reasonableness and in terms of the	25 points

skills and qualifications of proposed staff.	
Proposed cost, recognizing that CTAA plans to enter into a fixed-cost contract not to exceed \$50,000.	10 points
Consultant’s references	15 points
Writing samples, in terms of topic coverage, types of documents, and quality of the writing to explain whatever topics are discussed.	25 points
DBE status: if at least 50% of the staff-hours proposed on this project will be performed by employees of an entity that is a certified DBE in one or more states where it currently does business, the proposal will receive 10 additional points	0 or 10 points

Proposing consultants should be aware that this Guide is part of a research project funded through a cooperative agreement between CTAA and the Federal Transit Administration (FTA), and they must be experienced and able to carry out work that must comply with applicable FTA regulations, policies and guidelines. Proposers without prior experience working with FTA or its grantees will need to be sure their submissions demonstrate a capacity to carry out FTA-funded work.

After carefully reviewing this Request for Proposals, if you have any questions, please send them by email to Andrew Carpenter of the CTAA staff at carpenter@ctaa.org no later than 5:00pm Eastern Time on September 17. CTAA will post its response(s), if any, to these questions on the N-CATT website no later than 11:59pm on September 21. Aside from emails, any phone calls or other efforts to communicate with CTAA concerning this RFP may result in your proposal being rejected.

The selected proposer must be registered in SAM.gov and must remain in good standing

Submission Instructions

Please submit your proposal as a single document, in PDF format, to carpenter@ctaa.org no later than 5:00pm Eastern Time on September 30, 2020. No hard copy submissions will be accepted.

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Page 8 of 8

CTAA reserves the right to reject any and all proposals in response to this RFP, and may terminate this solicitation without notice at any time prior to entering into a contract for the indicated work to be performed.