



Request for Proposals:

Consulting Services to Develop and Facilitate Workshop on Managing and Making Decisions from Data

Issue Date: November 30, 2020

Deadline for Submissions: December 31, 2020

**Consulting Services to Develop and Facilitate Workshop on Managing and
Making Decisions from Data
Request for Proposals
RFP Number: 38715RFP 301**

What This Is

The Community Transportation Association of America, through its National Center for Applied Transit Technology (N-CATT), is soliciting proposals from consultants to develop content for and then facilitate a hands-on workshop for transit agency managers. The workshop will help the target audience upgrade their skills and knowledge on collecting data, tracking data, and making decisions based on that data.

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 December 31, 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 Data Workshop

Target Audience

General managers, operations managers, fleet managers, who have a sense they need to approach this but don't know where to start.

Desired Outcomes

1. Managers understand what information to track, how to track it, how to synthesize multiple streams of data, how to manage and make sense of it, and how to apply it and make decisions with it
2. Managers feel comfortable making data-informed decisions, from identifying patterns to verifying a decision manually and refining it after implementation
3. Managers have a tool or set of tools to frame what they hope to address, the information they have, and the information they need
4. Managers understand how to collect and refine data in a standard format for the agency to minimize information loss, ensure decision-makers work with the same set of information
5. Improve confidence in making decisions on this topic

General Framework

1. Pre-Workshop
 - a. Attendees document relevant data
 - b. Attendees identify challenge(s) they hope to address
 - c. Attendees fill out a survey on their comfort/familiarity with the subject matter
2. Part 1: What We Know Now
 - a. Discuss attendee survey responses to ensure understanding of questions, comments, knowledge, and comfort level
 - b. Provide basic approaches to the topic
3. Part 2: Upgrading Skills
 - a. Facilitator walks attendees through sample situation and decisions facilitator would make, with explanations. Sample situation should be designed around "average" of attendees' skills, comfort, and system demographics to ensure it is relatable
4. Part 3: Applying to Home
 - a. Facilitator helps attendees apply the concepts to their own data sets
5. Part 4: Conclusions

Scope of Work and Project Timeline

CTAA anticipates the selected consultant will perform the following steps:

1. Workshop Framework: **This task to be completed by January 27, 2021**
 - a. Finalize workshop framework with CTAA
2. Workshop Development: **This task to be completed by February 24, 2021**
 - a. Develop and administer a survey to gauge attendees' knowledge and comfort level with the subject matter

- b. Incorporate feedback into workshop content to meet attendees where they are
 - c. Develop materials on the basic approaches to the subject matter, including examples
 - d. Develop relatable “Sample Situations” to walk attendees through basic approaches
 - e. Develop sample datasets that can serve as effective teaching tools
 - f. Develop example lists of useful data for agencies
 - g. Develop example lists of useful collection devices for agencies
 - h. Develop other elements that will contribute to the desired outcome outlined in the framework above
3. Workshop Facilitation: **This task to be completed by March 26, 2021**
- a. Utilize the materials developed during workshop development according to the framework to facilitate a virtual workshop. This can either be one full day or two half-days.
 - b. Provide answers to follow-up questions or materials for two weeks following workshop
 - c. N-CATT will be present to provide troubleshooting assistance and assist in other aspects as requested by facilitator

Overall Project Timeline

- November 30: Request for Proposals (RFP) is issued
- Through December 11: 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.
- December 31: Deadline for consultants to submit proposals.
- January 13: CTAA selects a consultant, proceeds to negotiate and execute a contract with the selected consultant.
- January 27: Anticipated completion of Task 1, as detailed above.
- February 24: Anticipated completion of Task 2, as detailed above.
- March 26: Anticipated completion of Task 3, as detailed above.

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 milestone payments to be made to the consultant upon completion and acceptance of all work and work products under each task.

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. physical and mailing address, and
 - e. A one-paragraph summary abstract of the proposal that states (i) qualifications to perform the indicated work (one sentence), (ii) how the proposer intends 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 – using data practices to help achieve their goals and missions. CTAA will look for demonstrations that the proposer is able to create content that the target audience can relate to and apply to their situations.
- 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 workshop framework and scope of work. This narrative may include suggestions within the above Framework, or even suggestions for improving upon it. The narrative should include reasoning behind certain decisions. CTAA will look for evidence that the proposer will hold a workshop from which attendees feel they have additional tools or knowledge to work with (see Desired Outcomes above).
- 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. CTAA will look for demonstrations that project staff understand the target audience and have experience with providing educational workshops.
- 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, and
 - d. the price for which the proposer is prepared to perform this work.
- 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. This statement shall include a DUNS number; all consultants and subcontractors must be registered in SAM

- 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 work samples that highlight consultants’ ability to perform the work outlined above, preferably that are similar in type or topic to that described in this RFP. The samples should reflect the work of the individuals in the staffing plan so that CTAA can directly gauge consultants’ work quality.

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

CTAA staff will review the submitted proposals that are received at or prior to 5:00pm (Eastern Time) on December 31, 2020. Staff will contact the references listed in each responsive consultant’s proposal, 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, CTAA will apply the following selection criteria:

Understanding of how technology is – and can be – deployed among rural,	5 points 1 = Does not meet expectations
---	--

small-urban and tribal transit systems.	3 = Meets expectations 5 = Far outperforms expectations
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.	5 points
Proposed staffing plan, in terms of its reasonableness and in terms of the skills and qualifications of proposed staff.	5 points
Work samples, in terms of topic coverage, types of documents, and quality of the writing to explain whatever topics are discussed.	5 points
Consultant's references	3 points 1 = Does not meet expectations 2 = Meets expectations 3 = Exceeds expectations
Proposed cost, recognizing that CTAA plans to enter into a fixed-cost contract not to exceed \$50,000.	2 points Scored relative to other proposals
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 2 additional points	0 or 2 points

Proposing consultants should be aware that this workshop 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 December 11. CTAA will post its response(s), if any, to these questions on the N-CATT website no later than 11:59pm on December 15. 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.

CTAA reserves the right to request additional information before making an award. CTAA also reserves the right to seek clarification from any bidder or offeror about any statement in its bid or proposal that CTAA finds ambiguous.

Selection will be made based on best value.

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 December 31, 2020. No hard copy submissions will be accepted.

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.