

**n-catt**



**National Center  
for Applied Transit  
Technology**

**Request for Quotations:**

**Strategic Technology Technical Assistance  
Team Consultant Services**

Issue Date: November 7, 2022

Deadline for Submissions: November 21, 2022

## **Technical Assistance Consultant Services Request for Quotations RFQ Number: 387152-005**

### **What This Is**

The Community Transportation Association of America, through its National Center for Applied Transit Technology (N-CATT), is soliciting bids from consultants to support N-CATT in providing technical assistance services to five transit agencies through the Center's Strategic Technology Technical Assistance Team (STTATs) program. The consultant(s) responding to this RFQ will work closely with N-CATT staff to address the technology challenges identified by the recipient organizations and provide materials (e.g. implementation plans, solicitations) that help the agencies to begin making progress on those challenges.

**Interested parties must follow the instructions and format set forth in this Request for Quotations, for which responses are due no later than 11:59pm Eastern Time on November 21, 2022.**

### **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, N-CATT hosts resources such as guidebooks, podcasts, and webinars on its website for interested agencies to engage with as it relates to them. In addition, N-CATT provides technical assistance in various formats: hands-on workshops, Technology Summits for priority-setting at the state or regional level, and Strategic Technology Technical Assistance Teams for one-on-one technical assistance with N-CATT, consultants, and recipient transit agencies.

## Overview of Services Required

The contract for STTATs consultant services will be held between the consultant and the Community Transportation Association of America, which is the lead organization for N-CATT.

### **General Framework**

CTAA will select one consultant for each technical assistance project based on vendors' qualifications relative to each project's needs. It is possible that one consultant would be selected for multiple projects, and CTAA may elect to choose none for certain projects.

For each technical assistance project, the selected consultant will work with CTAA to perform a discovery process with the recipient organization (identified below); research and develop relevant information and materials for the recipient organization's ask, and; provide a final product for the recipient organization based on the organization's ask and any updates established through the technical assistance process.

Consultants will participate in the following for each organization receiving technical assistance:

1. An initial conference call between the N-CATT team and local or regional team members to identify information and assistance needs
2. Initial site visit, depending on agencies' needs and logistical capacity, to understand recipient organization's operating circumstances, and to hold visioning meeting with recipient organization to clarify organization's goals, objectives and needs and the type of best final product for them.
3. Virtual follow-up meetings as established among CTAA, consultants, and recipient organization, at least monthly.
4. Review and refine technological solutions or strategies for the recipient agency.
5. Interim site visit, if necessary, to gather additional information (e.g. community input, utility company collaboration).
6. Provide draft final product for review by recipient organization and CTAA.
7. Provide final product that will allow recipient organization to make meaningful progress on the technology challenge it hopes to address.
8. Conduct final site visit to present, review and discuss findings and recommendations with recipients, if necessary and capacity allows.
9. Providing a limited amount of post-visit follow-up support to the Strike Team recipient agency.

### **Desired Outcomes**

1. Recipient organizations will be able to apply final products to their planning/operations to make meaningful progress on their goals. For example, an organization seeking to procure and implement a real time passenger information system or add automated-vehicle location technology to their buses will have information on operational considerations, available products, management of the implementation and necessary content for a Request for Proposals to procure the technology
2. Recipient organizations invest in technologies that help them improve their planning and operations

3. Recipient organizations have a better grasp of potential technology investments to pursue after technical assistance ends
4. N-CATT staff can identify opportunities for similar organizations from which to learn and replicate
5. N-CATT staff can disseminate lessons learned from these processes to the industry

### **Recipient organizations**

Below are the tasks on which consultants will bid, in addition to descriptions of each recipient organization: (names will only be provided to selected consultant)

- **Organization 1:** Rural, demand-response operator in the northern Great Plains, covering 16,500 square miles. The operator has a fleet of 60 gasoline-powered vehicles, ranging from cutaways to transit vans and ADA-compliant minivans. The system is planning on purchasing propane vehicles, converting old vehicles, and building a fuel station with funding from a discretionary grant. This organization needs assistance in adding a fuel management system and real-time monitoring system to assist with reporting and analytics.
- **Organization 2:** Rural community action agency in a midwestern state, covering 5 counties. The agency operates 51 vehicles, from minivans to 18-passenger cutaways. This organization's goal is to evaluate their operations to identify opportunities for implementing technology; developing processes for collecting public input through virtual tools; and training on using digital analysis tools to improve service delivery
- **Organization 3:** A 24-vehicle rural, demand-response transit system in the Great Lakes region, covering about 900 square miles. This agency's goal is to evaluate their processes and identify areas of those operations where they can improve service with technology.
- **Organization 4:** A regional transportation provider in a rural/frontier transportation district in the southwest. This agency operates regional commuter routes, a small number of local fixed routes, and on-demand/paratransit zones, using 61 cutaway vehicles. This agency's goal is to examine options for their fixed-route scheduling/dispatch and CAD/AVL software and to identify their best possible path forward.
- **Organization 5:** A rural, county-wide, demand-response, service with 25 cutaway vehicles. This organization aims to identify processes that can be shifted from pen-and-paper to digital in an effort to make reporting, analysis, and dispatch more effective, as well as allow for management to focus their time on other tasks.
- **Organization 6:** A small-urban service with 14 fixed routes and a rapidly growing ADA complementary paratransit service, in the upper Midwest. This agency is beginning work on a Transit Development Plan (TDP), and the results of this effort will inform the technology tools that should be included in the TDP. In particular, the agency is interested in examining its future needs for scheduling/dispatch software, which is currently handled via spreadsheet; and for its farebox/fare payment system.

### **Scope of Work and Project Timeline**

CTAA anticipates the selected consultant will perform the following steps:

1. Task 1: Discovery.

- a. Perform an initial site visit – virtually or in-person – to recipient organization. This would preferably be in-person, but will depend on COVID-19 related restrictions and safety considerations, agreed to by recipient organization, N-CATT staff, and consultant.
  - b. Establish the current operating environment of the recipient organization relative to its goals, and identify areas of focus for the technical assistance
  - c. Work with N-CATT team and recipient organization to identify information needed to work towards final product
  - d. Develop work plan for the Strike Team process
  - e. **Deliverables:** 1 Operating environment report for each recipient; 1 Strike Team Work Plan for each recipient
2. Task 2: Interim Work.
- a. Collect data and information relevant to work plan and final product
  - b. Hold monthly check-in calls to discuss progress and identify informational or logistical needs
  - c. Coordinate reviewing opportunities for N-CATT staff and recipient organization to allow for course correction throughout the process
  - d. Incorporate feedback from recipient organization on needs relative to their stated goal
  - e. If needed, perform a second site visit to collect additional information or collaborate with additional stakeholders. To be agreed upon among recipient organization(s), N-CATT staff, and consultants
  - f. **Deliverables:** Draft final product for review by recipient organization; monthly check-ins with N-CATT staff and recipient organizations; second site visit if agreed to.
3. Task 3: Final Product.
- a. Incorporate feedback from draft report and second site visit
  - b. Develop report and presentation outlining findings for key stakeholders
  - c. Consult with the FTA, when requested, regarding Strike Team activities for N-CATT
  - d. Identify opportunities for improvement or course correction throughout project as appropriate; highlight successes to replicate
  - e. Provide an anonymized/generic version of the final product for N-CATT to disseminate to organizations with similar needs and goals as a reference
  - f. **Deliverables:** Final report and presentation for each recipient organization; monthly meetings with N-CATT staff and recipient organization(s) to discuss product; generic version of final report; limited after-action support for recipient organization.
4. Task 4: Sustainability Plan.
- a. Work with CTAA and technical assistance recipients to create a document to guide the recipients in furthering their efforts after official technical assistance has ended
  - b. **Deliverable:** Sustainability plan, approved by recipients
5. **Option:** Additional work beyond the scope. In all cases, CTAA anticipates the discovery process will reveal tasks to add onto the existing scope of work. For example, in previous

project years, the Sustainability Plan task was discovered as a need after beginning the process. This will be discuss with selected consultant(s) if and when such needs arise.

The timeline for each deliverable will be worked out with CTAA and each TA recipient. However, all work will be finished by May 31, 2023.

### **Price**

CTAA intends to execute a fixed-price contract with the selected consultant, exclusive of travel. Unless negotiated differently to both parties' satisfaction, the term of this contract would be for milestone payments based on the above scope of work, to be made to the consultant upon completion and acceptance of all work and work products under each task. Consultant may be asked to travel to destinations within the U.S. approximately three times during the term of the contract. Consultant will be directly reimbursed for travel costs.

### **Term of the Agreement**

CTAA has been awarded a one-year cooperative agreement with the FTA to operate N-CATT. The consultant's contract with CTAA will end in May 2023.

## **Bid Requirements**

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

- 1) A 1-page cover sheet with:
  - a. Bidder's name / Firm Name
  - b. telephone number,
  - c. email address,
  - d. physical and mailing address, and
  - e. A one-paragraph summary abstract of the bid that states (i) qualifications to perform the indicated work (one sentence), (ii) how the bidder intends to approach the indicated work (maximum of three sentences), (iii) the names, titles, corporate affiliations and pertinent experience of all individuals the bidder intends to have conduct the indicated work (one sentence per individual), and (iv) the fixed price, exclusive of travel, for which the bidder is prepared to perform this work, for each organization for which the bidder indicates interest.
- 2) A narrative of no more than three pages in length that explains – in sufficient detail – how the bidder would carry out the four tasks detailed above; the bidder's understanding of working with small transit agencies and factors relevant to technology implementation in such regions, and; the bidder's experience and qualifications in a manner that demonstrates their ability to conduct work similar in nature and scope to what is requested.

Consultant should indicate the projects for which they are bidding using the following table, which refers to the Recipient Organizations described starting on page 4. The narrative should address the consultant's proposed method relative to the indicated projects. Bidders may use up to three pages for each organization for which they indicate interest.

<u>Organization</u>	<u>Bidder Interest</u>
Organization 1	
Organization 2	
Organization 3	
Organization 4	
Organization 5	
Organization 6	

- 3) 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. 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
  - c. the price for which the bidder is prepared to perform this work, **for each organization for which the bidder indicates interest. In addition, provide one hourly rate for the Optional Task 5.**
  
- 4) 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
  
- 5) Statement that the consultant is not debarred or suspended from contracting with the federal government
  
- 6) CTAA does not anticipate bids 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 bid, an acceptable bid must include a letter or other signed statement from the submitter’s proposed partner(s) agreeing to be included in this bid, and the bid must include items (4) through (8) from the above list for every proposed subcontractor or other external partner that is included in this bid. If the bidder 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 bidder will address that staffing need without jeopardizing timely and satisfactory completion of the work being proposed. All subcontractors must also be registered in SAM.
  
- 7) 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 RFQ. The samples should reflect the work of the individuals in the staffing plan so that CTAA can directly gauge consultants’ work quality.

8) Please indicate your organization’s current travel and pandemic-related safety protocols.

**Disadvantaged Business Enterprise Participation**

If more than 50 percent of the staff-hours proposed to be spent by employees of a certified DBE, that bid will receive additional consideration, as detailed under “Selection Criteria,” below.

**Selection Criteria and Process**

CTAA staff will review the submitted bids that are received at or prior to 11:59pm (Eastern Time) on November 21, 2022. Staff will contact the references listed in each responsive consultant’s bid, but will not engage in any other communication with the bidder or their employees or proposed partners prior to making its decision.

In reviewing consultants’ submissions to this RFQ, CTAA will apply the following selection criteria:

Understanding of work to be done	5 points  1 = Does not meet expectations  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
Cost, exclusive of travel	2 points  Scored relative to other bids
DBE status: if at least 50% of the staff-hours proposed on this project	0 or 1 points



will be performed by employees of an entity that is a certified DBE in one or more states where it currently does business, the bid will receive 1 additional point	
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Bidders should be aware that this 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. Bidders 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.

The selected bidder and subcontractors 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 that CTAA finds ambiguous.

Selection will be made based on best value.

### **Submission Instructions**

Please submit your bid as a single document, in PDF format, to [carpenter@ctaa.org](mailto:carpenter@ctaa.org) no later than 11:59pm Eastern Time on November 21, 2022. No hard copy submissions will be accepted.

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