



Request for Qualifications:

Consulting Services for Strike Teams and State Summit Technical Assistance

Issue Date: February 10, 2020

Submission Date: March 6, 2020

**Consulting Services for Strike Teams and State Summit Technical Assistance
Request for Qualifications
RFQ Number: 38715RFP 002**

What This Is

The Community Transportation Association of America, through its National Center for Applied Transit Technology (N-CATT), is seeking expressions of interest and qualifications from consulting firms and individuals to become part of a pool of qualified experts and generalists in areas of technology innovation and deployment among rural, small-urban and tribal public transportation systems. Consultants whose qualifications are accepted by CTAA may be deployed as members of N-CATT's Innovative Technology Strike Teams, may be used as general technologists or subject matter experts at N-CATT's State Technology Summits, and may be considered for other engagements by CTAA.

Interested parties must follow the instructions and format set forth in this Request for Qualifications, for which responses are due no later than 5:00pm Eastern Time on March 6, 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.

N-CATT Technical Assistance

In 2020, N-CATT will provide in-depth technical assistance in two ways:

1. **Innovative Technology Strike Teams** (hereinafter referred to as Strike Teams). Up to four rural, small-urban, and/or tribal transit agencies will receive technical assistance through the Strike Teams to give their leadership and stakeholders the opportunity to explore achievable technology solutions to their systems' goals. Doing so will help agencies learn about promising practices, collaboration strategies, and how to look for technology, and will result in an actionable plan to accomplish those goals through a plan for technology procurement, testing, or piloting; or creation of a detailed plan for executing these tasks or for a longer-term in-depth plan. The transit agencies receiving assistance from these strike teams will be selected competitively by N-CATT, and the strike teams' work with these agencies will take place between March and June 2020.
2. **State Technology Summits**. N-CATT will partner with up to three state departments of transportation (DOTs) to host two-day summits with those states' small-urban, rural, and tribal transit agencies that will provide a space for networking and collaboration at the state level, and will result in an actionable plan to explore, study, or deploy a technology for those agencies within the state. The states hosting these technology summits will be selected competitively by N-CATT, and the State Summits themselves will take place between March and June 2020.

N-CATT's Use of Qualified Consultants

To ensure these activities succeed, CTAA intends to engage and deploy qualified consultants to work alongside its N-CATT staff in carrying out the technical assistance work associated with the Strike Teams and State Summits. Consultants may be used as specific subject matter experts in some instances, and may be used as general technologists in other instances.

1. A general technologist will be involved with framing, planning for, and performing on-site work with each Strike Team-selected applicant and State Summit selected state. Because strike teams and state summits may be taking place concurrently in different locations around the country, N-CATT anticipates deploying two or more qualified consultants as technology generalists.
2. Technology subject matter experts will provide expertise and guidance relating to their area(s) of expertise. They will be called upon as needed, depending on the selected communities' goals, to participate with Strike Teams and State Summits that focus on or involve their area of expertise.

As the locations for N-CATT strike teams' work and state summits are determined, CTAA shall prepare task orders it will issue to qualified consultants. Issuance of these task orders will be based on the content and scoring of consultants' qualifications as presented in response to this solicitation, as well as consultants' availability for the specific dates, locations and engagements in the task order. These task orders will follow one of the four types of consultant deployment detailed below. Qualified consultants may be asked to work on multiple task orders, and consultants may decline to accept any or all task orders that are offered, without prejudice. Consultants may not assign work under an N-CATT task order to any third party.

Task Orders for Strike Team General Technologists

The purpose of the Strike Team technical assistance program is to assist up to four transportation agencies in addressing clearly articulated goals through technology adoption. The technical assistance will focus on working with the agency to navigate technology decisionmaking, whether adoption of new technology, conducting a pilot or demonstration of a new technology, or upgrading a technology, to achieve a specified goal or related set of goals.

The Strike Team collaboration with selected applicants will result in development of an actionable plan based on the teams' selected focus areas.

Consultants assisting N-CATT as Strike Team general technologists will participate in the following for each agency receiving Strike Team technical assistance:

1. An initial conference call between the N-CATT team and local or regional team members,
2. An on-site scoping visit of two days' duration,
3. Review and refine technological solutions or strategies for the recipient agency, identifying subject matter experts as appropriate,
4. An on-site planning and technology refinement visit of two days' duration,
5. A limited amount of post-visit follow-up support to the Strike Team recipient agency, and
6. Contributing to after-action reports and briefing papers prepared by N-CATT.

Task Orders for Strike Team Subject Matter Experts

As stated above, the purpose of the Strike Team technical assistance program is to assist up to four transportation agencies in addressing clearly articulated goals through technology adoption. The technical assistance will focus on working with the agency to navigate technology decisionmaking, whether adoption of new technology, conducting a pilot or demonstration of a new technology, or upgrading a technology, to achieve a specified goal or related set of goals. The Strike Team collaboration with selected applicants will result in development of an actionable plan based on the teams' selected focus areas.

Consultants assisting N-CATT as Strike Team subject matter experts will participate in the following for each agency receiving Strike Team technical assistance:

1. Assisting with the review and refinement of technological solutions or strategies for the recipient agency, as determined by N-CATT staff and general technologists through prior meetings and site visits with the recipient,
2. Possibly assisting with an on-site planning and technology refinement visit of two days' duration, and
3. Providing a limited amount of post-visit follow-up support to the Strike Team recipient agency.

Task Orders for State Summit General Technologists

The State Technology Summits will offer state DOTs, in conjunction with multiple transit agencies within the state, a unique networking, learning, information sharing, and planning opportunity focusing on practical application of new and pilot technology(ies).

Consultants assisting N-CATT as State Summit general technologists will participate in the following for each event:

1. An initial conference call between the N-CATT team and the state-level lead contact and up to 3 local State Summit participants to review and refine goals and expectations of the state summit, existing or expected challenges, and whether to include additional participants, such as advocates, other stakeholders, and/or representatives of additional transit agencies among the invitees,
2. Assisting in developing the State Summit agenda and materials,

3. Attending and participating in the two-day state summit,
4. Providing a limited amount of distance-based post-State Summit support to the participating entities, and
5. Contributing to the preparation of a brief report about the State Summit.

Task Orders for State Summit Subject Matter Experts

As stated above, the State Technology Summits will offer state DOTs, in conjunction with multiple transit agencies within the state, a unique networking, learning, information sharing, and planning opportunity focusing on practical application of new and pilot technology(ies).

Consultants assisting N-CATT as State Summit subject matter experts will participate in the following for each event:

1. Assisting in developing the Summit agenda and materials, as determined by N-CATT staff and general technologists, in response to priorities and issues presented by the state
2. Attending and participating in the two-day state summit, and
3. Providing a limited amount of distance-based post-State Summit support to the participating entities.

Roles and Responsibilities of N-CATT General Technologists and Subject Matter Experts

General technologists:

1. Work with N-CATT staff on providing technical assistance to selected agencies and/or state DOTs for Strike Teams and/or State Summits
2. Attend site visits and participate in Strike Team and/or State Summit activities, outlined above
3. Participate in framing conference calls for assigned Strike Teams and State Summits
4. Use site visits to work with N-CATT and selected Strike Team communities to identify most relevant technologies that can help accomplish the stated goals
5. Assist in development of action plan for Strike Teams or State Summits to guide participants' planning, piloting, testing, or implementation of new technologies to accomplish agencies' goals
6. Participate in State Summit planning and day-of meeting to assist state DOT(s) to realize its vision for a successful State Summit as a means to reaching a clearly articulated goal, as stated in the application(s) from the state DOT(s)
7. Participate in post-on-site Strike Team work (up to two one-half hour calls, up to one hour of follow up assistance, via conference call or equivalent media within the two months after the plan is issued) and post-State Summit work (up to two half-hour calls, up to one hour of follow up assistance, via conference call or equivalent media within the two months following the State Summit)
8. Contribute to preparation of brief report about each Strike Team and/or State Summit project participated in

Technology subject matter experts:

1. Expertise in one or more of the following technology subject matters:
 - a. Mobility as a Service and One-Call/One-Click/One-Tap building block technologies and capacities that comprise these;

- b. Ridehailing, microtransit and other on-demand services that complement transit service;
 - c. Automated vehicle planning and pilots;
 - d. Real-time transit information;
 - e. Open Source software that enables interoperability of systems (such as GTFS and GTFS-Flex);
 - f. Open data;
 - g. Fare integration; and
 - h. Electric buses and related charging infrastructure or facilities.
2. Work with N-CATT staff on providing technical assistance to selected agencies and/or state DOTs for Strike Teams and/or State Summits
3. Attend site visits and participate in Strike Team and/or State Summit activities, as outlined above
4. Participate in preparation for Strike Team visits and State Summits
5. After site visits, work with N-CATT and selected Strike Team communities to identify most relevant technologies, and communicate related information about planning, testing or piloting timelines, and associated costs and variables, that will influence how to accomplish articulated goals identified by selected Strike Team and State Summit agencies
6. Assist in development of action plans for selected agencies or summits to guide their planning, piloting, testing, or implementation of new technologies to accomplish agencies' goals
7. Participate in State Summit planning and work to assist state DOT(s) to realize vision(s) for a successful State Summit as a means to reaching a clearly articulated goal, as stated in the application(s) from the state DOT(s)
8. Where needed, participate in post-on-site Strike Team work (up to two half-hour calls, up to one hour of follow up assistance, via conference call or equivalent media within the two months after the plan is issued) and post-State Summit work (up to two half-hour calls, up to one hour of follow up assistance, via conference call or equivalent media within the two months following the State Summit)

Timeline

- February 10: Opportunity is announced
- February 19: Questions about the Strike Team opportunity are due by 12:00pm EST. Questions may be submitted to carpenter@ctaa.org. Responses to questions will be compiled into one document and sent to all consultants who submit questions.
- February 21: N-CATT disseminates answers to vendor questions
- March 6: Statement of qualifications due by 5:00pm EST
- March 9-13: N-CATT may hold follow-up calls with up to 5 proposing consultants
- March 18: Selected consultant(s) announced
- March through July 2020: N-CATT Strike Teams work with selected agencies
- September 2020: N-CATT, consultant, and agencies finalize action plans for agency to implement a technological tool identified as most likely to address the agency's challenge, goal, or enhancement.

Statement of Qualification Requirements

Consultants who are interested in serving as technologists for the Strike Teams and/or State Summits should submit a Statement of Qualification with the following information:

- 1) Cover sheet with:
 - a. Name,
 - b. telephone number,
 - c. email address,
 - d. street address, and
 - e. name of firm.
 - f. Statement identifying type of consulting services offered, whether response as a general technologist; and/or technology subject matter expert.
 - g. If technology subject matter expert consulting services are offered, please identify which area(s) of expertise. The relevant areas of technology subject matter expertise are:
 - i. Mobility as a Service and One-Call/One-Click/One-Tap building block technologies and capacities that comprise these;
 - ii. Ridehailing, microtransit and other on-demand services that complement transit service;
 - iii. Automated vehicle planning and pilots;
 - iv. Real-time transit information;
 - v. Open Source software that enables interoperability of systems (such as GTFS and GTFS-Flex);
 - vi. Open data;
 - vii. Fare integration; and
 - viii. Electric buses and related charging infrastructure or facilities.
- 2) For each individual being proposed by this consultant, a resume or CV that describes:
 - a. Qualifications of the consultancy and the individual(s) being proposed,
 - b. A brief summary of consultant's work that is relevant to this solicitation, and
 - c. Descriptions of 2-3 similar projects consultant has worked on that demonstrate relevant skills and experience.
- 3) A daily or hourly rate for consulting services to participate, as noted above, in type of work activities described for Strike Teams and State Summits.
- 4) 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 RFQ
- 5) Statement that the consultant has legal authority to work in the United States.
- 6) Statement that the consultant is not debarred or suspended from contracting with the federal government
- 7) Identification of blackout dates, if any, between March 1, 2020 and July 31, 2020, when unavailable for site visits for Strike Teams and State Summits.

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 March 6, 2020. N-CATT staff will contact the references listed in each

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responsive consultant's submission of qualifications, and may schedule follow-up phone calls with up to 15 consultants who submit statements of qualifications. The result of this N-CATT review will be the establishment of a pool of qualified consultants who will be tasked with assisting N-CATT as general technologists and subject matter experts for its Strike Teams and State Summits. Inclusion in this pool of qualified consultants does not guarantee any work to any selected consultant.

In reviewing consultants' submissions, N-CATT will apply the following selection criteria:

Consultant Qualifications – general: to what extent does the consultant demonstrate experience relevant to the stated N-CATT activities?	15 points
Consultant Qualifications – specific: to what extent does the consultant demonstrate specific experience relevant to their skills as a general technologist, and/or specific experience relevant to their skills for consideration as a subject matter expert in one or more of the 8 enumerated areas for which N-CATT seeks qualified subject matter experts?	25 points
Consultant's price	5 points
Consultant's references	15 points

Consultants will be notified if they are found to be qualified for inclusion in the N-CATT pool of general technologists and subject matter experts. A standard agreement shall be executed between CTAA and every consultant included in this pool; that agreement shall include a description of the types of duties for which the consultant may be engaged by N-CATT, will include the rate and basis upon which payment will be made for any authorized work that is performed under task orders arising from N-CATT activities, and will include standard contractual terms and conditions, in compliance with CTAA's policies and procedures, and in compliance with applicable requirements associated with technical assistance activities funded by the Federal Transit Administration. Specific task orders will be issued to consultants as appropriate to N-CATT activities, including the strike teams and state summits described above.

After carefully reviewing this Request for Qualifications, if you have any questions, please email them to Andrew Carpenter, carpenter@ctaa.org, no later than 12:00pm EST on February 19, 2020. No phone calls, please.

Submittal Instructions

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Please submit your statement of qualifications in one document, in PDF format, via email to carpenter@ctaa.org no later than 5:00pm EST, on March 6, 2020. No calls, please.