



Request for Proposals/Bids

Strategic Planning/Adaptive Strategies Facilitation

The Community Transportation Association of America (CTAA) is seeking a facilitator to lead the Board of Directors and staff through an inclusive strategic planning and adaptive strategies process that will guide the Association's activities for the next three-to-five years. CTAA is a 501(c)(3)-organized nonprofit, national membership organization with more than 1,000 members who believe that mobility is a basic human right. From work and education to life-sustaining health care and human services programs to shopping and visiting with family and friends, CTAA Board, staff and members understand that mobility directly impacts quality of life.

CTAA members are in the business of moving people – efficiently and cost-effectively. CTAA staff, board and members are dedicated to inclusively ensuring that all Americans, regardless of age, ability, geography or income, have access to safe, affordable and reliable transportation. Our priority is our members and the communities and passengers they serve. This emphasis on our members and safety has been amplified during the COVID-19 global pandemic, where CTAA has developed and shared safety protocols, promising practices and shared techniques to help members bring ridership back to their operations.

The objective for this project is to create, using realistic scenario planning tools, an organization strategic plan that builds a set of adaptive strategies to secure the Association's future and sustainability. Ideally, the plan will encompass CTAA's core business centers of federal grants; projects; membership; training and certification; conferences; and finance, while also taking into account potential new activity centers. Within each of these activity or business centers, this process should consider and develop performance metrics, key partnerships, evaluation criteria, potential risks, succession plans and more.

Requirements

- Experience with developing strategic plans that organizations have used to guide their growth, activities, social impact, economic viability and capacity to deliver.
- Experience facilitating strategic plan development using virtual platforms and breakout rooms.
- Experience with 501(c)(3) nonprofit organizations and nonprofit sustainability.
- Experience in inclusive planning.

- Experience in project management.
- Experience in working with a diverse group of individuals and diverse groups of people, recognizing cultural sensitivity

Preferred

- Experience with membership associations.
- Experience with public and community transportation.
- Proposer is a DBE/MBE/WBE.

References

All proposers are asked to provide three (3) references from previous strategic plan facilitation projects.

Evaluation Criteria

In rank order CTAA will consider a proposer's experience (with an emphasis on virtual facilitation); the experience of the identified lead facilitator (in the case of a team proposal); identifiable outcomes and implementation of previous strategic planning projects; the clarity of response and proposed process that demonstrates a clear understanding of the desired outcomes; cost; the quality of previous final strategic plan reports (please submit one (1) previous strategic plan report/output with your proposal); the ability to meet timelines; and DBE/WBE/MBE status as the primary evaluation criteria for each proposal received.

Each proposal received will be evaluated using the following ratings criteria:

- Past Experience/Lead Facilitator's Experience — 50%
- Previous Strategic Plan Quality/Clarity of Response — 20%
- Cost — 10%
- Evidence of Previous Plan Implementation & Innovation — 10%
- Timeliness/Meeting Deadlines — 5%
- DBE/WBE/MBE Status — 5%

Evaluation Timeline

An ad-hoc committee of the CTAA Board of Directors along with the Association Executive Director will evaluate all submissions and plans to virtually interview a group of finalists selected from the initial proposal submissions.

Plan Timeline

Upon contract execution, CTAA envisions the process taking three-to-five virtual meetings with Board and staff. These virtual meetings will be no longer than two hours in duration and will be scheduled every two-to-three weeks. Proposers should include progress reports to the ad-hoc CTAA Board Committee and Association Executive Director after each of these virtual meetings. The Association expects the initial virtual meetings to be completed no later than Nov. 30, 2020, with the draft plan ready to circulate to the Board of Directors at the February 2021 meeting. Proposers should plan to be

present at the CTAA Winter 2021 (typically held late February/early March) Board Meeting to present and discuss with the full Board of Directors the draft plan. Thirty (30) days after this meeting, the final plan will be due to the Association Board and staff.

Deadline

Bids are due to CTAA's Executive Director Scott Bogren on or before Sept. 25, 2020. They should be emailed to bogren@ctaa.org. Please direct all questions to Scott Bogren via email: bogren@ctaa.org.