April 24, 2020

Dear Sir/Madam:

Enclosed please find Addendum No. 2 to SEPTA’s RFP No. 20-00053-AHAC – Management Consulting Services. Addendum No. 2 must be acknowledged by signing the attached Acknowledgement Sheet and including that sheet as part of your technical proposal.

The due date for submission of proposals remains unchanged and was incorrectly stated in Addendum 1 that it was extended. The original due date was May 6, 2020 and the current due date is Wednesday May, 6, 2020 by 4:30PM.

Please submit one (1) copy of your Technical Proposal via email to Heather Casullo hcasullo@septa.org AND submit one (1) Original Technical Proposal and one (1) original Price Proposal in separate envelopes to SEPTA, 1234 Market Street, 11th Floor, Philadelphia, Pennsylvania 19107, to the attention of Heather Casullo.

All inquiries regarding this Procurement must be directed Heather Casullo at (215) 580-7421 or hcasullo@septa.org.

Sincerely,

Heather Casullo

Heather Casullo
Sr. Contract Administrator
Procurement, Supply Chain & DBE Dept.
The attached addendum to the Contract Documents is hereby part of the same and is incorporated in full as part of the Project. Proposer shall acknowledge Addendum No. 2 by signing and returning this Acknowledgement Sheet with the Technical Proposal.

FIRM NAME (typed or printed) ______________________________

AUTHORIZED SIGNATURE _________________________________

TITLE _________________________________

NAME (typed or printed) _________________________________

DATE_____________________

1. The due date for submission of proposals is Wednesday May 6, 2020 by the close of business (4:30 P.M.).

2. Questions and Answers are Attached

3. Corrected email for Barbarathomson16@gmail.com
Q1. How much of the scoring is based on location?
A1. Specific weights have not been assigned to each of the four evaluation criteria – however, the four evaluation criteria are listed in descending order of importance, and “location” is the least important of the four.

Q2. How much onsite work is expected?
A2. The amount of on-site work will depend on the project or task. Some projects require extensive on-site work; others can be done completely remotely. The answer to this question will depend on the type of work to which the consultant is assigned and the nature of each specific task.

Q3. With potentially 5 firms, will there be a general/lead firm or how will they be reporting to the SEPTA PM?
A3. Each successful proposer for each of the five areas of focus will be a “prime” with a direct reporting relationship with the SEPTA Project Manager. Each firm will have its own purchase order and contract with SEPTA’s Procurement Office.

Q4. Are there any incumbent consultants? Are there any in flight projects and what consultants are working on those?
A4. The incumbent prime consultants are North Highland, Bronner, and Guidehouse (formerly PWC). Currently, there are two “in-flight” projects – an update of SEPTA’s Economic Impact Analysis through North Highland and a development of new Cycle-County procedures through Guidehouse.

Q5. Insights and analytics - is there a preferred business intelligence tool?
A5. SEPTA currently uses Tableau for data visualization and analysis. Several hundred licenses have been procured for various staff – not an enterprise-wide solution yet, but widely used among certain business units.

Q6. What are the data sources for dashboards?
A6. SEPTA staff utilizes a wide variety of data sources for data visualization and analysis, and not every data visualization and analysis is done in tableau. The majority of Tableau-related work is done by connecting to back-end SQL tables, or to excel extracts of mainframe data.

Q7. Are there existing databases?
A7. Yes, while SEPTA still operates on a legacy mainframe system, many of the data sources have been migrated into SQL tables that can be accessed for analysis. Other databases exist throughout the organization as well – for instance, vehicle maintenance data is stored in a database called “VMIS”. Additionally, note that within the timeframe of this three-year management consulting contract, it is expected that the entire legacy mainframe will be converted into a modern cloud-based ERP.

Q8. Is there a systems architecture map that can be shared?
Q9. Who would we be reporting to on this project?

A9. The project manager for this contractual relationship will be Erik Johanson, Director of Business Innovation.

Q10. Can you provide an organization chart for the area under review?

A10. The consulting engagement will include many areas for review across the organization – it is not possible to share a single organizational chart for this project.

Q11. What deliverables are you expecting from this project?

A11. The deliverables will depend on the project or task. The deliverables could be reports for internal or public dissemination, new tools for staff use, or scopes of work to be used for RFPs. The answer to this question will depend on the type of work to which the consultant is assigned and the nature of each specific task.

Q12. What is your goal for the project? What does a successful project look like?

A12. The goals will depend on the project or task, but in general, a successful consulting engagement has three key characteristics: 1) a project delivered on time and on budget; 2) a deliverable that adheres to the task’s scope of work; and 3) a deliverable that directly adds value to SEPTA’s business objectives.

Q13. What specific concerns might you have related to the project?

A13. Specific concerns will depend on the project or task, but in general, the most important concerns to be addressed with each project or task is the delivery of project: 1) on-time and on-budget; 2) adherence to scope; 3) that adds value to SEPTA’s business objectives.

Q14. What is the timeline for the project? What are the anticipated start and completion dates?

A14. Each successful proposer will have a contract for three years to complete various projects at the direction of the project management. The anticipated start of the contract is mid-2020, and the anticipated completion of the contract is mid-2023.

Q15. Are you open to working with a firm that is not local?

A15. Yes, location is part of the technical evaluation criteria, but the fourth of four in order of importance, and not a prerequisite to be a successful proposer.

Q16. Are there specific professional standards you want to be followed?


Q17. Is there a small business and/or DBE requirement? If so, what is it? Do you have a list of approved firms?

A17. Yes, there is a 10% goal for DBE participation.

Q18. Is there a current provider of these services? If so, who is it and why are you looking to make a change?

A18. The incumbent firms are North Highland, Bronner Group, and Guidehouse (formerly PWC). The reason for the RFP is the conclusion of the current contract with each firm.
Q19. When was the last project completed in this area? Can you provide us a copy of the report?

A19. Tasks under each incumbent contract have been ongoing since the inception of the contracts in 2017. Current tasks ongoing including an update of SEPTA’s Economic Impact Analysis through North Highland and a development of new Cycle-County procedures through Guidehouse.

Q20. RFP references SEPTA Strategic Business Plan with a hyperlink in the RFP. The hyperlink to the Strategic Business Plan available for viewing is 2015-2019. Is there an updated Strategic Plan available for viewing?

A20. SEPTA is in the process of updating its Strategic Business plan – no update is available at this time.

Q21. Please clarify that you want proposals by two methods:

a. By mail: a printed version of the price proposal, as well as a thumb drive with digital files of the 2 files;
b. By email: a digital version of the technical proposal.

A21. Submit one copy of the Technical Proposal in the mail and the price proposal in the mail in two separate envelopes with a thumb drive containing the documents and ALSO submit only the Technical Proposal via email to Heather Casullo at hcasullo@septa.org.

Q22. If a firm is a Small Veteran Owned business, does that meet the DBE requirements for SEPTA?

A22. All firms must be certified as a DBE by the Pennsylvania Unified Certification Program (PA UCP) www.paucp.com prior to starting work on this project in order to qualify towards the DBE goal.

Q23. Would you like the responses combined into one, or have a separate proposal for each of the task areas? We understand that you want us to indicate on the cover letter which we are adherent to but we are looking for some guidance on how you would want the body of the proposal organized.

A23. The responses can be combined in a single proposal. Please indicate in the cover letter of your proposal specifically which of the five focus areas are being addressed in the proposal and for which the proposer would like to be considered.

Q24. As part of the guidelines, the RFP states that the partner firm must have an office located in Philadelphia. We have consultants that can do work all over the country. Can you please elaborate on the parameters of this ask and confirm whether this is a hard requirement?

A24. Location is part of the technical evaluation criteria, but the fourth of four in order of importance, and not a prerequisite to be a successful proposer.

Q25. In scope of work item 1) Traditional Management Consulting, what business processes are in scope for process modeling, re-engineering, and gap analysis and best practices?

A25. SEPTA uses this category of the Management Consultant Services contract as a catch-all for business processes that may require process modeling, re-engineering, gap analysis and best practices. Since 2017, tasks have focused on Human Resources, Training, Inventory Management, Paratransit Operations, and Disadvantaged Business Enterprise Certifications.

Q26. Due to COVID-19’s effect on business, please clarify how SEPTA would like receipt of technical and price proposals. Would separate emails each for technical and price proposals be acceptable, along with separate USBs being sent to SEPTA’s office in lieu of hard copies?
A26. See Answer to question 21.

Q27. Please clarify SEPTA’s protocol on delivery of packages to its office if we were to have this hand delivered.

A27. See answer 21.

Q28. Please provide a list of the pre-proposal attendees.

A28. List of emails were provided in Addendum 1.

Q29. Would it be possible to consider a limit of liability within this contract?

A29. To be discussed with intended awardees and SEPTA Management.

Q30. Out of the 15 departments which departments should we focus on?

A30. No focus areas or priorities have been established for the management consulting contracts as of yet. The priorities will largely be established as part of the development of SEPTA’s next five-year strategic business plan, which is forthcoming. Focus areas from the most recent management consulting contracts included Inventory Control, Management Training, Disadvantaged Business Enterprise Certification Process, Paratransit Operations, and Human Resources.

Q31. How many people are in scope in each concerned department?

A31. See answer to question 30.

Q32. Are the number of supervisors vs. staff as reported in the 2020 budget current for each concerned department?

A32. Roughly, yes.

Q33. How many unions are within each concerned department?

A33. See answer to question 30.

Q34. For clarity, does SEPTA requires consultants to do current and future state analysis with implementation of the analysis?

A34. Consultants are rarely involved in implementation, with the exception of potentially some initial change management and training on new standard operating procedures, as appropriate.

Q35. Does SEPTA have an Improvement Team? If so, what will be their role in this RFP?

A35. SEPTA’s Office of Innovation serves as a de facto Improvement Team, and the Office of Innovation is in charge of Project Managing this RFP and the role of the management consultants.

Q36. Will there be additional communication on scope and deliverables so that we can better develop our proposal and pricing?

A36. Prior to the Technical Proposal and Price Proposal being submitted, the pre-proposal meeting and addendums are the only form of communication. If the question is referring to specific task order requests, then yes there will be further communication.
Q37. Does SEPTA require different technical and pricing package submission if a consultant plans to bid on more than one workstream?

A37. No, proposers can submit a single application, however, proposers are asked to note in the cover letter of the proposal under which of the five categories the proposal should be considered.

Q38. When does SEPTA expect to award the contract and when is the expected work start date?

A38. The current target for contract award and start date is third quarter of 2020.

Q39. With COVID-19 is SEPTA, Proudfoot has tools to do some of the work initially remotely, thus is SEPTA open to such discussions?

A39. Much (but not all) of the work associated with these management consultant contracts can be done remotely.

Q40. Can you share details of any projects, including objectives, that are planned to begin in Q2 or early Q3 2020?

A40. See answer to question 30.

Q41. Understanding that the service areas of focus can vary between management consulting firms, are there more specific competencies that are important to demonstrate and helpful to SEPTA in making its decision? Are there specific strategic initiatives, beyond the information shared in the strategic plan that you can share?

A41. See answer to question 30.

Q42. What is the average range of fees for individual projects awarded under this agreement, over the most recent three year period.

A42. The range of fees is broad and providing a current average is not necessarily representative of future engagements and therefore not relevant to the preparation of your fees.

Q43. What is the anticipated date you plan to award an agreement to the selected firms?

A43. Third quarter 2020.

Q44. Will departments outside of the office of innovation be permitted to leverage this award as a contracting vehicle for their operational and/or capital projects? If so, has this been a common occurrence during the previous three-year contract period?

A44. Yes, in fact the Office of Innovation often partners with other business units to pursue their own business process re-engineering and transformation leveraging these management consultant contracts as support.

Q45. What was the collective amount awarded under this contracting vehicle during the prior 3 year contracting period?

A45. The previous collective amount awarded is the same as for these forthcoming contracts - $1.5 million total over three years.

Q46. May a responding firm provide a DBE participation target with its submitted proposal and not name the specific firm it intends to partner with, understanding that the firm would be named prior to contract signing?
A46. Yes, however it is preferred that the information is submitted with the Technical Proposal for DBE verification purposes.

Q47. How will price/hourly rates be factored as part of SEPTA’s overall evaluation of each submitted proposal?

A47. Both technical capabilities and price will be factors in SEPTA’s selection of a Consultant who provides a combination of technical competence and price that results in the best value for SEPTA.

Q48. What are the communications formats SEPTA regularly uses for channeling its messages?

A48. SEPTA has a combination of traditional and digital messaging formats, including the newsroom and various topical microsites on septa.org, marketing information on isptaphilly.com, and various social media channels (for example, @septaphilly, @septa_social).

Q49. Who are the key stakeholders for SEPTA when communicating messages?

A49. Key stakeholders include federal/state/local elected officials, advocacy groups, SEPTA customers, as the general public.

Q50. What is SEPTA’s media reach? Does it extend beyond Philadelphia and the surrounding counties on larger issues?

A50. Typically SEPTA’s media reach is within the Greater Philadelphia media market, however SEPTA news stories often extend beyond the Greater Philadelphia media market into national industry publications and other news outlets.

Q51. Last, could you again outline the response delivery guidelines (i.e. to who and how many copies.)

A51. See answer 21.

Q52. Will teams that can address more of the five areas receive preference through the scoring system?

A52. No, teams will not receive preferential treatment on the basis of submitting a proposal for more than one category. Each proposal will be evaluated on the basis of its technical merit under each category individually.

Q51. Will the scoring process account for comparison between a team that responds to a subset of the areas and a team that responds to all of the areas?

A51. See evaluation criteria.

Q52. Will SEPTA consider a two week extension for submittals?

A52. No.

Q53. If we team with a DBE, is that 10% participation goal expected to be applied to each of the tasks we would propose to conduct, or could we potentially team with a DBE but have one workstream directed just to that firm?

A53. The goal applies to the total value of all applicable work performed under a resulting contract, including change orders and amendments. How the 10% goal is attained by the Prime is their decision and what works best for the task orders. We just require a DBE be utilized for at least 10% of the total Contract Value.