

**Transportation Options Group of Oregon (TOGO) Strategic Plan Development
Request for Proposals
Due December 8, 2023 at 5 pm**



SECTION 1: General Information

General Purpose

TOGO is seeking a Consultant to create a 5–7-year Strategic Plan as a road map to better serve its mission to promote transportation options and a balanced transportation system for current and future transportation landscapes. The Consultant will develop a series of recommended goals, objectives, strategies, and actions for the organization that cover shorter (3-5 year) and longer-term (5-7 year) time frames.

TOGO Background

TOGO is a nonprofit organization created by transportation options professionals in the late 1990s. TOGO's leadership consists of a Board of Directors and Officers, all of whom voluntarily serve the organization. Funding is through annual member dues. TOGO's mission is to promote transportation options and balanced transportation systems across Oregon through advocacy, programming, policies, and services. Further information about TOGO can be accessed at togo-oregon.org

Closing Date and Time. All Proposals must be received by 5 pm on or before December 8, 2023 (closing Date and Time"). Please see Section 2 of this RFP for submission instructions.

SECTION 2: Proposer Submittal and Other Requirements

- Cover Letter: Proposer must submit a cover letter summarizing the Proposal.
- Contact information: Proposer must submit the name and title of its primary contact regarding this RFP, the business name, the primary address, the primary contact's telephone, and email. Proposal length: Proposals shall be no longer than 5 pages excluding cover letter and firm resume.
- Firm Resume: Proposer must submit a firm resume outlining experience with similar planning processes.
- References: Proposer must submit a list of three clients and contact information for whom similar goods and services have been provided.
- Project Approach: Proposer must submit an overview of a proposed project approach and high-level timeline.
- Key Personnel: Proposer must provide a list of key personnel who will be assigned to the project. This list will include each individual's name, title, qualifications, and areas of expertise.
- Budget: Proposer shall provide a total price for goods and services. Project amount is not-to-exceed \$10,000. Budget should include non-reoccurring expenses such as travel.
- Submittal: Proposer shall submit an electronic copy before proposal deadline to Derek Hofbauer, TOGO Board Member and Communications Committee Chair, at dhofbauer@coic.org.

SECTION 3: Scope of Work

Note: *The project scope that follows is one recommended approach. TOGO is amendable to other proposed approaches that result in the above final product.*

Project Management and Kick Off Meeting

Duration of the Project

- The project will be no longer than one-year from the initial notice to proceed (NTP).

Project Team Meetings

- The Project Management Team (PMT) shall consist of the Consultant or Consultant Team and TOGO Strategic Plan Committee members. The TOGO's Executive Committee shall attend relevant meetings.

Deliverables:

- *Up to five (5) Project Team Meetings*

Kickoff Meeting and Project Approach

- The Consultant will organize and facilitate the project Kickoff meeting. Attendees will include the PMT and TOGO Board representatives. Consultant will provide the agenda, a draft Project Approach, and deliverables timeline for feedback. The Project Approach shall be a reference throughout the project to ensure key deliverables are being met.

Deliverables:

- *Coordination and facilitation of Project Kickoff Meeting*
- *Draft and Final Project Approach with deliverables timeline*

Research:

- **Internal SWOT Analysis:** Consultant will develop, gather, and analyze a Strength, Weaknesses, Opportunities, and Threats (SWOT) analysis. Participants include PMT, TOGO Committee Chairs, and Executive Committee. Consultant shall prepare a draft and final **Memo #1 SWOT Review** with initial strategic themes identified.

Deliverables:

- *Facilitated SWOT Analysis and Memo #1*

- **External TOGO Member Online Survey:** Consultant shall develop with assistance from the PMT an online survey to TOGO's membership base. The survey will assess the perceived value of TOGO from current and former members. Consultant shall prepare draft and final **Memo #2 Survey Findings** with identified areas of needed improvement. The Consultant may utilize a Board member's SurveyMonkey account to conduct the assessment, if desired.

Deliverables:

- *Draft/final survey questions with assistance from the PMT*
- *Memo #2 Survey Findings and relationship to identified strategic themes*

Interviews

- **TOGO Members:** Consultant shall conduct up to five (5) in-depth interviews among with current member agencies and organizations to understand how TOGO currently serves, does not, or could in the future. Interview questions will be based on Memo #2 Survey Findings for additional qualitative information to guide Consultant’s strategic goals and objectives development. Consultant shall prepare draft and final Memo #3 Research Summary.
- **Affiliated Partner/Interested Parties Interviews:** Consultant to conduct up to five (5) interviews with affiliated partners/interested parties who aren’t currently members but would possibly benefit from membership or partnership with TOGO, such as Community Based Organizations (CBOs), public health agencies, Transportation Network Companies (e.g. Uber/Lyft), Oregon Transit Association, Washington State Rideshare Organization, Department of Environmental Quality, Association for Commuter Transportation, veterans groups, equity/diversity groups, Latino organizations, low-income housing organizations, and educational institutions. The Consultant will develop interview questions input from the PMT.

Deliverables:

- *Interview questions with for current members and affiliated partners/interested parties.*
- *Memo # 3: Research Summary including current, and affiliate interested parties’ input and strategic themes as outlined in Memos 1 & 2.*

Develop TOGO Strategic Goals and Objectives:

Consultant shall develop a series of short and long-term goals and objectives for TOGO. Using the Memo # 3 (SWOT analysis, member survey results, and interview findings), Consultant shall develop goals and objectives for the short term (3-5 years) and long term (5-7 years). Based on draft goals and objectives, consultant shall suggest any potential updates to TOGO’s mission and vision statements.

Deliverables:

- *List of short and longer-term goals and objectives statements*
- *Potential refinement/revisions to current TOGO mission and vision statements.*

Develop TOGO Strategic Recommendations and Considerations:

Based on Memo #3 (SWOT Analysis, partner interviews, and member survey results, and interview findings), Consultant will develop short and long-term strategies/actions for the following TOGO focus areas:

- Administration
- Funding
- Communications
- Legislative
- Membership
- Training/Education
- Equity

Deliverables:

- *Comprehensive list of short and longer-term actions/strategies for each of the seven categories listed.*

TOGO Board Member Strategic Planning Work Session (early 2024):

Consultant will facilitate a two hour in-person, virtual, or hybrid session with the TOGO Board to discuss Memo #3 findings, as well as preliminary goals, objectives, and recommendations. The TOGO Board will provide additional perspectives and insights that will be incorporated into the draft plan.

Deliverables:

- *One facilitated TOGO Board Member strategic planning session, anticipated in early 2024*

Draft Strategic Plan Development:

Consultant will develop the Draft Strategic Plan that is consistent with the Project Approach. The TOGO Board will provide initial input on the Draft Strategic Plan through one round of consolidated revisions, which will be coordinated by the PMT.

Deliverables:

- *Draft Strategic Plan with one round of revisions from the TOGO Board that are consolidated and coordinated through the PMT.*

Final Strategic Plan Development:

Consultant will receive one round of consolidated, final comments from the Board to incorporate into the Final Strategic Plan. Consultant will present the Final Strategic plan to the TOGO Board either virtually or in person during the Spring TOGO Board Meeting in 2024, which typically occurs in April or May.

Deliverables:

- *Consultant will present Final Strategic Plan to the TOGO Board, Final Strategic Plan in Word and PDF formats.*

SECTION 4: EVALUATION AND AWARD

Evaluation by Committee. Proposals will be evaluated by a committee consisting of representatives from TOGO's Legislative and Strategic Plan committees ("Committee").

Initial Evaluation

Completeness and Compliance of Proposal. Proposals will be evaluated for completeness and compliance with the requirements of this RFP. Those Proposals that are incomplete, do not meet all requirements of this RFP, or are otherwise deemed by Committee to be "non-responsive," will be rejected.

Criteria Evaluation

Responsive Proposals will be further evaluated by the Committee. For each of these Proposals, the Committee will allocate points (*up to the designated Maximum Available Points*) for the following criteria, and calculate the Proposal's total score:

	Criteria to be Evaluated	Maximum Available Points
1	<i>Proposal Requirements (Sections 1 & 2)</i>	<i>35 points</i>
2	<i>Proposal Approach to Scope of Work (Section 3)</i>	<i>35 points</i>
3	<i>Firm Resume – Experience, Key personnel, and References</i>	<i>10 points</i>
4	<i>Proposed Budget/Timeline</i>	<i>15 points</i>
5.	<i>Historically Underrepresented Businesses per Business Oregon Office of Minority Women's Business Enterprise Oregon</i>	<i>5 points</i>
	TOTAL	100 Points