



Transportation Options Group of Oregon (TOGO) Strategic Plan Development Request for Proposals - Due February 16, 2024 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 TOGO Board and Strategic Planning Committee will work collaboratively with the Consultant to 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 February 16, 2024.** Responses will be collected via a Google Form at <https://forms.gle/gwdbf42uibHg35pBA>

Please see Section 2 of this RFP for submission instructions.

SECTION 2: Proposer Submittal and Other Requirements

- 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.
Response length: Responses to questions shall be no longer than 5 pages.
- Project Approach: Proposer must submit an overview of a proposed project approach and high-level timeline, which may deviate from the proposed approach listed in the RFP.
- Budget: Proposer shall provide a total price for goods and services. Project amount is not-to-exceed \$12,000. Budget should include non-reoccurring expenses such as travel.
- Submittal: Proposer shall submit responses to a short questionnaire that can be accessed at <https://forms.gle/gwdbf42uibHg35pBA>. For questions, please contact 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 Board shall attend relevant meetings. The TOGO Board meets in a hybrid setting quarterly throughout the year in person and will set aside time for strategic planning sessions with the consultant to provide efficiencies throughout the project.

Deliverables:

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

Kickoff Meeting and Project Approach

- The Consultant will work collaboratively with the Strategic Planning Committee to 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, with assistance from the Strategic Planning Committee*
- *Draft and Final Project Approach with deliverables timeline*
- *Conduct SWOT Analysis during the kickoff meeting, if desired*

Research:

- **Develop SWOT Analysis:** Consultant will work collaboratively with the TOGO Board to develop a Strength, Weaknesses, Opportunities, and Threats (SWOT) analysis. The initial phase of the SWOT analysis may be conducted during the Project Kickoff Meeting to gather input directly from the TOGO Board. Based on input received from the TOGO Board, Consultant shall prepare a draft and final **Memo #1 SWOT Review** with initial strategic themes identified.

Deliverables:

- **Facilitated SWOT Analysis and Memo #1 SWOT Review**
- **TOGO Member Online Survey:** Consultant shall develop with assistance from the PMT an online survey to TOGO's membership base. The PMT will provide contact information for

member organizations and individuals. The survey will assess the perceived value of TOGO from current, former, and potential members. Consultant shall prepare draft and final **Memo #2 Survey Findings** that includes a high-level analysis of survey findings. The Consultant may utilize a Board member's SurveyMonkey account to conduct the assessment, if desired. Consultant may also utilize time during the TOGO quarterly meetings to engage members and constituents directly or as a group. Consultant may recommend a different approach altogether for soliciting feedback among existing and potential members.

Deliverables:

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

Develop TOGO Strategic Goals and Objectives:

Consultant shall facilitate one in-person, virtual, or hybrid session with the TOGO Board to develop a series of short and long-term goals and objectives for TOGO. The Strategic Planning Committee will schedule and organize this session, which would likely occur during the next quarterly TOGO Board meeting. Using Memos #1 (SWOT analysis) and #2 (member survey results) and the Board's input, Consultant shall develop a draft list of SMART goals and objectives for the short term (3-5 years) and longer term (5-7 years). Based on draft goals and objectives, consultant shall suggest any potential updates to TOGO's mission and vision statements.

Deliverables:

- *Memo #3: Draft list of short and longer-term SMART goals and objectives statements*
- *Potential refinement/revisions to existing TOGO mission and vision statements.*

Develop TOGO Strategic Recommendations and Considerations:

Building on Memos #1, #2 and #3, Consultant shall develop short and longer-term strategies and actions for the following suggested TOGO focus areas. Consultant may recommend a different approach for developing strategic recommendations and considerations. The categories listed below are suggestions based on TOGO's committee structures and may be revised.

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

Deliverables:

- *Memo #4: comprehensive list of short and longer-term actions/strategies for the suggested categories listed.*

TOGO Board Member Strategic Planning Work Session (mid to late 2024):

Consultant will facilitate a two-hour in-person, virtual, or hybrid session with the TOGO Board to review Memo #3 and #4 findings and recommendations, as well as seek further input from the Board to refine the recommendations. The TOGO Board will provide additional perspectives and insights that will be incorporated into the Draft Strategic Plan.

Deliverables:

- *One facilitated TOGO Board Member strategic planning session, anticipated in mid-to late 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. If needed, the Board will meet during an in-person, virtual, or hybrid meeting to discuss the Draft Strategic Plan and provide feedback to Consultant. The Strategic Planning Committee will be responsible for scheduling that meeting.

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 a TOGO Board Meeting in late 2024 or early 2025.

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. Responses will be evaluated by a committee consisting of representatives from TOGO's Legislative and Strategic Plan committees. Responses will be collected via a Google Form at the following link: <https://forms.gle/gwdbf42uibHg35pBA>

Initial Evaluation

Completeness and Compliance of responses, which will be evaluated for completeness and compliance with the requirements of this RFP. Those responses 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

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

	Criteria to be Evaluated	Maximum Available Points
1	<i>Requirements (Sections 1 & 2)</i>	<i>30 points</i>
2	<i>Approach to Scope of Work (Section 3)</i>	<i>40 points</i>
3	<i>Firm Experience</i>	<i>10 points</i>
4	<i>Proposed Budget/Timeline</i>	<i>15 points</i>
5.	<i>Historically Underrepresented Business, Minority Business Enterprise, Women Business Enterprise, and/or other affiliation.</i>	<i>5 points</i>
	TOTAL	100 Points