



REQUEST FOR PROPOSALS (RFP) No. 26-02

FIVE YEAR STRATEGIC PLAN DEVELOPMENT

QUESTIONS AND ANSWERS

1. Did you say that you would share a contact list?

Yes, the contact list is posted to NVTC's procurement webpage and eVA.

2. Is NVTC willing to disclose any information regarding cost? Is there a NTE amount?

NVTC has secured a matching DRPT grant of \$150,000 for a total of up to \$300,000 to complete this process. Note that NVTC will use some of this funding to secure venue and meal options for the workshop outlined in Task 4 of the Statement of Work (pg. 22).

3. Does NVTC have an anticipated contract-value range or planning budget for RFP 26-02 that offerors should use when developing the separate price proposal?

Yes, please see the answer to question number 2.

4. Has NVTC established an anticipated budget or funding range for the complete 18-month engagement?

Yes, please see the answer to question number 2.

5. Has NVTC established a budget range or not-to-exceed amount for this engagement?

Yes, please see the answer to question number 2.

6. Please provide guidance on the envisioned cost range of this effort.

Please see the answer to question number 2.

7. To help inform our proposed approach and level of effort, could you please indicate whether an estimated project budget has been established and whether it is anticipated to be in the range of \$300,000 (based on FY2027 DRPT grant funding and local match)?

Yes, please see the answer to question number 2.

8. Section A.12.C states that price will be considered in negotiations but need not be the sole or primary determining factor. Is price scored during the technical evaluation described in Section A.18.B, or considered only after Offerors are ranked?

Price is not scored during the technical evaluation ranking and is only considered during the negotiation phase.

- 9. Payment turnaround for routine progress invoices. Section D.1 states that payment for amounts withheld shall be made within 45 calendar days of receipt and acceptance of all products at the conclusion of the project, but does not state a payment turnaround for the routine monthly progress payments. What is the actual payment turnaround for routine progress invoices during the course of the contract?**

Payment is generally made within 45 days of receipt of a properly prepared project invoice.

- 10. Page limit scope. Section A, Item 18 sets a 25-page maximum for the Technical Approach and Work Plan (subsection D) and a separate 2-page maximum for the Quality Assurance Program (subsection E). Does the 25-page limit apply only to subsection D, or does it also encompass Project Staffing (F), Firm Experience and Capabilities (G), and the remaining narrative subsections (H through J), none of which have a stated page limit of their own?**

The page limits apply only the sections outlined in the Request for Proposals (Section A, Item 18, subsections C, D, and E). There is no page limit for project staffing, firm experience and capabilities and the remaining narrative subsections.

- 11. Would NVTC consider a proposal addressing a specialized analytical component of the scope rather than serving as the full-service strategic planning consultant, or does NVTC require each offeror to perform and take responsibility for the complete scope outlined in Tasks 1 through 6?**

No, it is incumbent upon the offeror to find subcontractors to take responsibility for tasks outlined in the scope of work that the offeror is not performing. NVTC expects offeror's proposal to include the entire scope of work.

- 12. Firm asks that they specializes in infrastructure assumption verification, decision assurance, demand durability and institutional risk analysis. Our potential contribution would be narrowly focused on the organizational assessment, external-trends analysis and implementation framework — specifically testing whether consequential planning assumptions are sufficiently supported, identifying dependencies that could affect strategic objectives, and establishing measurable decision and revalidation criteria. We would not propose to duplicate the stakeholder facilitation, transit-planning or organizational consulting functions contemplated elsewhere in the RFP.**

Please see answer to question 11.

- 13. If NVTC does not contemplate separately awardable or partial scopes, I would appreciate confirmation so we can evaluate responsiveness appropriately.**

Please see answer to question 11.

14. Task 3 requires interviews with Commissioners and Committee Chairs, NVTC staff, member jurisdiction representatives, and regional and state partners. Approximately how many individual interviews does NVTC anticipate across those four groups?

The consultant team will determine the number of interviews necessary with key stakeholders to collect the information necessary to inform their work. Note that the Commission is made up of 26 board members and NVTC has 3 core teams: Programs and Policy, Finance and Administration and Strategic Communications.

15. Task 3 notes that Virginia law requires any meeting with more than two Commissioners to be a public meeting. Does NVTC expect Commissioner and Committee Chair input to be gathered through individual or paired interviews, through noticed public meetings, or both?

NVTC expects interviews to take place with Commissioners in either individual or paired meetings.

16. Could you address how the Framework relates to this strategy effort again?

NVTC's strategic framework serves as a guideline for a more comprehensive strategic plan. It outlines NVTC's vision, mission, goals and objectives. This document is the "north star" of NVTC but does not layout a roadmap or a strategic plan to guide NVTC's next 5 years of work. NVTC's Strategic Framework is on pages 18-19 of the RFP.

17. Task 2 requires analysis of nine program areas, from financial management and grant administration through internal operations. What program-level documentation — work plans, staffing allocations, performance reporting, committee records — does NVTC expect to make available?

NVTC's project manager and staff will make available the documents necessary to complete Task 2.

18. Page 2 anticipates project completion on or about Spring 2028. Section C.5 states an anticipated duration of approximately 18 months, with Notice to Proceed expected in December 2026. Which should the proposed schedule and level of effort reflect?

NVTC anticipates that the work on the Strategic Plan should be finalized by approximately June 2028.

19. Task 3 calls for 5 to 8 focus groups. Should the work plan and price proposal reflect a specific number within that range, or provide a per-focus-group unit price?

The proposal should reflect a specific number within that range.

20. Are the focus groups and stakeholder interviews expected to be conducted in person, virtually, or a mix, and does NVTC anticipate sessions held at locations across the member jurisdictions?

NVTC expects focus groups and stakeholder interviews to be formatted to best accommodate the interviewees' schedule while also facilitating a clear and candid conversation. Other than in-person meetings as stipulated in the RFP, NVTC does not impose a specific meeting format.

21. Task 1 requires an in-person kickoff and bi-weekly meetings with the NVTC project manager. Tasks 3 and 5 each require presentations to NVTC senior staff and to the Executive Committee, and Task 6 requires availability during presentation to the Commission and committees. Which of these does NVTC expect to be attended in person?

Please see the answer to question 20.

22. Task 4 includes bylaws among the items to be validated or proposed for change, and the deliverable is a Bylaws and Organizational Structure Options Report. Does the scope include drafting amended bylaws language, or presenting structural options for NVTC and its counsel to draft?

The consultant team is expected to present structural options for NVTC and counsel to draft.

23. Task 5 requires an implementation roadmap with performance metrics. Does NVTC have an existing performance measurement or Commission reporting framework that those metrics should align with?

No.

24. Task 6 requires the consultant to be available during presentation of the draft plan to the Commission and its committees. Does NVTC anticipate formal adoption of the plan by the Commission, and is the consultant expected to support revisions between committee review and adoption?

Yes, NVTC does anticipate formal adoption of the plan by the Commission. Yes, the consultant is expected to take feedback from the committees and incorporate the feedback in follow-up work.

25. The scope has several categories of stakeholder interviews. For uniform pricing purposes, what is the expected number or range of individual interviews?

Please see the answer to question number 14.

26. For benchmarking, does NVTC have an anticipated number of peer organizations in mind for this benchmarking assessment?

Approximately five organizations.

27. Are there any staff positions that NVTC views as critical to the success of the project that firms should include as Key Personnel?

This is for the offeror to determine in their proposal. The RFP defines key personnel as skilled, experienced, professional and/or technical personnel who are essential for the successful accomplishment of the work.

28. During the pre-proposal it was mentioned that NVTC would provide some coordination and logistics with the partner agencies and stakeholders. Kindly clarify to what extent NVTC will perform such actions and what the consultant team should provide.

Task 4 of the Statement of Work states that the consultant team will facilitate the workshop and provide materials. NVTC will procure the event venue and provide food and refreshments for the workshop. In coordination with the consultant team, NVTC will post the event to its public facing website to conform with open meeting regulations and send invitations to the workshop attendees.

29. Is NVTC open to bidders' recommendations regarding changes to the order of specific tasks and activities that are described in the scope (without changes to the tasks or activities themselves)?

Yes.

30. In Task 2, the scope references "conduct[ing] peer benchmarking to identify gaps and opportunities (MWCOC, TPB, NVTA, NVRC, etc.)." Does NVTC want to exclusively focus on other agencies in the region, or does NVTC have interest in understanding how organizations with comparable mandates in other regions operate?

NVTC is open to understanding how organizations with comparable mandates operate in other regions; however, a regional focus is central to NVTC's work and therefore closely working with organizations in the Greater Washington D.C. region is paramount.

31. Is there a page limit for qualifications in Section F: Project Staffing (Qualifications and Experience)?

Please see answer to question 10.

32. Does NVTC have a preference for activities being held in-person or virtually during Task 3: Stakeholder Engagement & Focus Groups?

Please see answer to question 20.

33. Please confirm that the following link contains the full copy of NVTC's 2014 Strategic Framework:
<https://novatransit.org/uploads/aboutNVTC/NVTCStrategicFramework2014.pdf>

Yes.

34. Could NVTC clarify whether the intended primary method for this engagement is focus groups, or whether 1:1 interviews should also be expected?

Focus groups and one-on-one interviews are both expected.

35. Is NVTC open to conducting all focus groups virtually?

Please see answer to question 20.

36. The RFP mentions in-person events (the kickoff meeting under Task 1, the strategic planning workshop under Task 4, and possible in-person interviews during the selection process). Can NVTC confirm that these are the only instances requiring in-person presence?

Please see answer to question 20.

37. Can NVTC confirm that no presentation is required for Task 6?

An NVTC staff member will present the draft strategic plan outlined in Task 6 to the Commission and committees. The consultant team will need to be available for questions following the presentation.

38. Since Task 4's workshop is considered a public meeting, are there specific notice or format requirements (e.g., FOIA or Virginia open meeting rules) that we should account for in our approach?

Yes, NVTC will post the meeting to its public facing webpage.

39. Who is going to manage the project at NVTC?

Genoveva Cutrell

40. Are WMATA, VRE, and other transit providers in Northern Virginia aware of this study and to what extent will they be relied upon to be engaged and active stakeholders?

Information about NVTC's strategic planning initiative is available in public facing documents such as board meeting materials and NVTC's Workplan. As a co-owner of VRE and a close collaborator with WMATA and other regional transit systems, NVTC expects those entities will be reliable and engaged stakeholders.

41. Approximately how many individual stakeholder interviews does NVTC anticipate in addition to the required five to eight focus groups?

See answer to question 14.

42. Should offerors assume that stakeholder interviews and focus groups may be conducted virtually, or should the price proposal include in-person delivery throughout Northern Virginia?

See answer to question 20.

43. Will NVTC provide existing stakeholder lists, governing documents, prior studies, organizational materials, and relevant data at project initiation?

NVTC's project manager and staff will provide the necessary documents to facilitate task completion at task initiation.

44. Does NVTC expect the selected consultant to recruit and schedule stakeholders, or will NVTC manage invitations and scheduling while the consultant designs and facilitates the sessions?

NVTC will provide a list of contacts; however, the consultant team is expected to schedule meetings with stakeholders. NVTC will handle the invitations and public notice for the half-day workshop outlined in Task 4.

45. For the evaluation criterion concerning Virginia transit systems/governance knowledge, may the experience of named subcontractors and key personnel be credited equally with the prime offeror's corporate experience, provided those individuals/firms are committed to the proposed team?

Yes.

46. For the requirement to identify a minimum of three similar projects performed within the last five years, may qualifying projects performed by proposed subcontractors satisfy that requirement in combination with the prime's experience, or must the prime itself provide three such projects?

The projects performed by the proposed subcontractors will satisfy the requirements.

47. May comparable strategic-planning work performed for federal, defense, regional-governance, public-sector, or transportation-adjacent organizations receive credit toward the experience criteria when the work included organizational assessment, stakeholder engagement, governance analysis, performance management, and implementation planning?

This experience will count toward criteria A and B. Criterion C specifically evaluates experience with Virginia transit systems and governance structures.

48. For the required Virginia transit and governance experience, will NVTC evaluate the combined experience of the prime contractor and named subcontractors as an integrated project team?

Yes.

49. May relevant projects performed by proposed subcontractors be included among the three required comparable projects?

Yes.

50. Attachment B asks whether the offeror is authorized to do business in Virginia. Must that authorization be in place at proposal submission, or may an otherwise-qualified offeror obtain Virginia authorization prior to contract execution/award?

The authorization to do business in Virginia must be in place at the time of proposal submission.

51. Attachment B, Item C.4 requires identification of subcontractors, their anticipated role and level of effort. Should individual consultants engaged directly by the offeror, rather than through a firm, be listed there?

Yes.

52. Attachment B asks whether the offeror is authorized to do business in Virginia. Is registration with the Virginia State Corporation Commission required at the time of submission, or as a condition of award?

See answer to question 50.

53. Attachment B (RFP Submission Form) asks offerors to indicate whether they are a Disadvantaged Business Enterprise (DBE) and to identify the certifying entity. For a small business that is more than 50% minority-owned but does not currently hold Virginia SWaM or DBE certification, should the offeror check the DBE box and identify itself as minority-owned, with "N/A" listed as the certifying entity? Or is this section intended only for firms that hold a current formal DBE/SWaM certification?

NVTC encourages participation of DBE/SWAM businesses but has not established goals. When completing the form, a firm should only indicate they are DBE/SWAM if certified. However, the firm may provide additional information about the firm and as to why they are not certified.

54. Attachment B, Section C asks about the firm's general character of work, whether it has ever failed to complete awarded work, and whether it has ever defaulted on a contract. Should these responses reflect the prime contractor only, or should they also address the history of any proposed subcontractors? If subcontractor history is required, should that be included within the same blanks, or should each subcontractor complete a separate copy of Section C?

Attachment B is to be completed by the prime contractor who is submitting the proposal, and who would potentially enter into a contract with NVTC under this RFP.

55. Attachment C requires certification from "the Contractor" and "the Subcontractor." If our firm serves as Prime and brings on an individual consultant (not a separate business entity) to assist with the work, does that person qualify as a "Subcontractor" requiring their own signed Attachment C?

Yes, assuming the individual is not an employee of the contractor.

56. Is there an anticipated minimum participation level or preference associated with Small, Women, Minority, or Service-Disabled Veteran-Owned businesses, notwithstanding the statement that no formal goal has been established?

See answer to question 53.

57. Section A.25 states that no participation goal is established for small, women-owned, minority and service disabled veteran-owned businesses, and Attachments D and E request participation information. Is that information scored, and under which evaluation criterion? Does NVTC recognize certifications issued by other states?

NVTC encourages participation of DBE/SWAM businesses, however it is not a scored criteria. Indicate the certifying agency on Attachment B.

58. If the Offeror itself qualifies as a DBE/SWaM firm (but is not using any additional SWaM/DBE/SDV subcontractors), should Attachment E still be submitted marked "N/A," does the Offeror's own DBE/SWaM status need to be reflected on this form instead, or should it be documented some other way?

Attachment E can be utilized to document the Offeror's own DBE/SWAM status, as well as any subcontractors.

59. Beyond compliance with Title II of the ADA, does NVTC require deliverables to conform to a particular accessibility standard, such as WCAG 2.1 AA or Section 508?

Yes, any document that is posted by NVTC to mobile and web applications will be WCAG 2.1 AA compliant. Documents and presentations presented to NVTC in draft or final form need to be checked for accessibility prior to submission.

60. Section C.4 requires all final deliverables to comply with Title II of the ADA, and Task 6 identifies the Draft Final Strategic Plan as a Word document only. To which accessibility standard should deliverables conform, and does NVTC expect the consultant to perform accessibility remediation and final document production?

See answer to question 59.

61. Section E.24 refers to errors and omissions insurance. Is Professional Errors and Omissions coverage required for this contract, and at what limit?

The required insurance coverage is indicated in Attachment A.

62. The RFP states that all final deliverables must comply with Title II of the ADA. Can NVTC share its required accessibility standard(s) for these deliverables?

See answer to question 59.

63. Will the selected consultant be expected to supply translation, interpretation, or multilingual engagement services?

No.

64. Task 2 requires review of NVTC governing documents, including the Virginia state code, Memoranda of Agreement, Bylaws, the Strategic Framework, Work Plans and organizational charts. Which of these will be provided to the selected consultant, and which does NVTC expect the consultant to obtain independently?

Please see answer to question 43.

65. Will the selected consultant receive the materials underlying the 2014 strategic planning effort and the 2018 strategic retreat, including consultant reports, working papers and retreat documentation?

NVTC will make its best effort to provide underlying materials to the consultant from the 2014 strategic planning effort and the 2018 strategic retreat if requested.

66. For a small business without company-owned vehicles or employees other than the owner, will NVTC consider appropriate alternatives to the workers' compensation and owned-automobile insurance requirements?

As noted in Section A, item 4., any exceptions to the liability provisions or Terms and Conditions contained in the RFP must be explicitly stated in the proposal. The firm may explain the reasoning for the exceptions.

67. 20. Section C.2 states that funding for this effort will be supported by a fiscal year 2027 grant from DRPT with local match. Does the grant period constrain when work must be performed or invoiced over the term of the contract?

No.

68. Please confirm whether attendance at the optional information session has any bearing on proposal responsiveness or evaluation.

Attendance at the information session has no bearing on the proposal responsiveness or evaluation whatsoever.

69. Section A.18.F requires résumés of no more than one page for all key personnel. Is there a limit on the number of key personnel whose résumés may be submitted?

Please see answer to question number 10.

70. Section A.18 sets page limits for the letter of transmittal, the technical approach and work plan, the quality assurance program, résumés and project descriptions. Do the title page, table of contents, list of authorized negotiators, exceptions statement, amendment acknowledgments and Attachments A through E count against any page limit?

Please see answer to question number 10.

71. Does NVTC require a specific font, type size, margin, page orientation or file-naming convention for the PDF submissions?

No.

72. Should the technical and price proposals be uploaded as two separate PDF files through the procurement portal, and does the portal require registration in advance of the October 9 deadline?

The technical and price proposals can be uploaded either as separate documents or together. The portal does not require registration in advance of the October 9 deadline.

73. Section E.16 requires disclosure of any use of Artificial Intelligence in developing the response, and identification of any planned use during contract

performance. Where in the technical proposal should that disclosure appear, and is a specific format preferred?

Where and how the use of artificial intelligence is disclosed in the proposal is at the firm's discretion. Firms are encouraged to include a PDF copy of the firm's internal artificial intelligence policy.

74. Beyond the evaluation criteria, what can NVTC share about the proposal evaluation process? Specifically, what degree and directness of influence/advice/voting will representatives of partner agencies have on the selection process?

NVTC will not share information about the evaluation committee or process beyond what is outlined in the RFP. NVTC values partner feedback; however, this contract is focused on NVTC and its strategic role as an organization supporting transit in Northern Virginia. This is the lens through which NVTC views this work.