

REQUEST FOR QUALIFICATION (RFQ)
FOR
TECHNICAL WORK FOR TRANSIT TRAINING PARTNERSHIPS

TRANSPORTATION LEARNING CENTER

Please refer ALL Inquiries to Procurement Officer:

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Request for Qualifications

Transit Training Partnerships

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Section A: Introduction and Background Information

The Transportation Learning Center seeks consultants to assist in developing and supporting local, state, regional and national labor-management transit training partnerships and to assist partnerships in improving organizational effectiveness.

Background Information

An aging workforce. Studies indicate that in the next five years, nearly half of current skilled maintenance workers in transit will be eligible for retirement.

New technology. Buses, subway cars and light rail vehicles all rely on increasingly complex electronic systems. Training of current workers has lagged behind the implementation of these technologies.

Growing demand. Transit ridership is growing fast in many urban areas of the country. With increasing gasoline prices, growth in transit ridership will continue, and the demand for skilled workers to keep the systems running effectively will also grow.

Working with local transit agencies and their unions, the Center helps develop and support transit training partnerships to address many of these challenges. These partnerships use data-based decision making to help train current mechanics to an expert level. Career ladders help lower-skilled workers move into the mechanical trades. The partnerships can also reach out to local high schools, community colleges and workforce boards to develop a pipeline for future workers coming into transit careers that provide good wages and excellent benefits.

Section B: Scope of Work Requested

For partnerships to thrive, they require data that is jointly developed, jointly owned and directly relevant to training. In the Center's work with transit training partnerships, a skills gap analysis has met the test of being jointly developed, jointly owned and relevant to training.

Going forward, the Center seeks consultants capable of building labor-management partnerships, conducting skills gap analyses, and developing training plans.

Steps in the skills gap analysis process include:

1. Coordination with Center staff and consultants in the formation of labor-management work groups and a policy committee. This coordination will include an orientation for key stakeholders on all the steps in the process. The Center and the partnering consultant need to ensure that they understand the needs of the partners and that the partners understand what to expect from a training partnership and skills gap analysis. Typically, a project launch meeting will be the milestone for this step in the process.
2. Job Task Analysis. Management and labor representatives will jointly choose three to five subject matter experts in each job classification to manage the skill gap analysis process. *Subject matter experts* are those employees who are among a firm's most knowledgeable and experienced employees and are consistently the highest performers in their jobs. Using national transit maintenance training standards, a survey instrument will be subject to review and approval by the training partnership.
3. Survey of all workers in relevant job classifications. From the perspective of the individual worker, this survey will be confidential; neither management nor labor representatives at any level will be able to view the results for individual workers. Reports on the skills gap will contain aggregate data at a level that will not allow for inferring results for individuals. The data will be held by the Center and by the partnership. No supervisor can view the individual worker's responses the survey, and the partnership agrees that any data from the skills survey can be used only to improve skills and competencies and cannot be used for any disciplinary purposes.

The survey lists the tasks related to the desired skill level and employees rank their ability to perform each task using the scale below:

N/A - Unaware of this type of work

1 - Aware of this type of work

2 - Able to perform this type of work with supervision

3 - Able to perform this type of work independently

4 - Able to instruct others in this type of work

This survey method provides a simple and clear mechanism for comparing current employee knowledge, skills and abilities to those required for optimum performance and has been proven as a reliable technique to benchmark job competency skills, assess individual workers and develop individual and group training plans. It is also an effective tool for determining regional skill needs in the industry, developing regional training strategies and measuring skill growth to assess return on investment.

4. Skills Gap Analysis Report. Once the survey is complete, the consultant will produce a report detailing the gap between the current level of workforce skills and the level required to function at the level of the national standards. The results of the skill surveys are recorded in a database that allows for analysis and comparison of the data in multiple ways, including by job classification, location and skill set. Each participating organization receives a skill gap analysis and a training plan.

5. Curriculum development. Once the skills gap analysis report has been received and discussed by the partnership stakeholders, it can serve as the basis for developing training for current workers and new hires. The knowledge of frontline mechanics, supervisors and trainers gathered through the skill gap analysis is the foundation of developing customized curriculum and a sustainable training program.

Additionally, the Center is embarking on an extension of its partnership work to focus on a range of modern workforce practices. We seek consultants to assist with implementation of important innovations in transit and other industries that will make transit a more attractive place to work, and second to propose alternative approaches to upgrading organizational practice across the industry. These will include implementing more modern workforce practices, producing better operational results, and making public transit a more rewarding place to work.

The Center will also be continuing and extending its work with national joint labor-management committees working in a range of areas, including development and refinement of standards for skills training, development of curriculum and courseware.

Potential consultants must have demonstrated experience working with labor and management on incumbent worker training programs. Consultants able to demonstrate specific experience with labor-management partnerships in transit will have a strong advantage in this process.

The needed skill sets for potential consultants include:

Excellent writing skills. All consultants will need to write regular reports detailing the progress of their work. In addition, consultants will need to draft letters and funding proposals to assist local partnerships in securing funds for training.

Organizational and group process skills. Working with partnerships requires an ability to work with different levels of leadership in both the management and the union. In sometimes contentious situations, identifying and building upon points of agreement will be key to starting the partnership. Organizing productive meetings of top policy makers and of working committees will also be necessary. An ability to identify and mentor individuals from both management and labor who can help champion the partnership is also essential. In addition to demonstrating excellent practice in these skills, the Center seeks contractors who can provide formal training in group processes. Subject areas can include but not be limited to: consensus decision making; effective participation in labor-management committees; effective mentoring practices; skills to read, interpret and effectively use financial and other technical data.

Information technology skills. Communication often takes place by electronic mail, and a lot of research needs to be conducted using the internet. Familiarity with and competence in Word, Excel and PowerPoint is required.

Experience in working with labor and management. Building and sustaining these partnerships requires an ability to understand the needs of both management and labor. Respondents to this RFQ must show a track record of working with labor and management on issues related to training.

In addition to these needed skills, the Center seeks consultants who can add value in one or more of the following areas:

Transit technology. As noted above, advanced technology is one of the main drivers behind the need for skill training. Consultants who demonstrate their understanding of these technologies can provide critical assistance to local partnerships and to the Center directly.

School to work programs. Transit has been less involved than many other sectors in reaching out to young people as potential workers. Transit offers good pay and excellent benefits. An ability to adapt lessons from other sectors in developing the school to career pipeline for transit would also aid the local partnerships and the Center.

Recruitment of non-traditional populations. Many adults can also be good potential recruits for transit careers. Again, other sectors have experience in recruiting women, for example, into non-traditional jobs. Translating that experience into the transit context also aids the local partnerships and the Center.

Section C: Selection Criteria

The rating process will consist of a three tier system based on the qualifications submitted that are similar to or the same as those specified in the **Scope of Work Requested** section, mentioned above. The rankings are as follows:

- Outstanding
- Satisfactory
- Unsatisfactory

Section D: Submission Requirements

This Request for Qualifications is open on a rolling basis beginning May 10, 2011; to be considered in the first round of reviews, submissions must be received no later than May 27, 2011. Submissions will be accepted continuously. The Center reserves the right to announce a closing of the process at a later date. Such announcement will be made on the Center's website, www.transportcenter.org. Qualifications can be submitted in hardcopy or in electronic medium accessible by PDF or Microsoft Word 2003-2007. Statements of qualifications will be reviewed as business needs of the Center dictate.

All potential consultants should provide the following:

- A statement of qualifications based on the scope of work requested. This statement should be brief (no more than 1000 words).
- A resume.
- At least four references of labor and/or management stakeholders familiar with the consultant's work.
- Rates for hourly and daily work

SUBMISSION OF QUALIFICATION PROPOSAL

The purpose of the proposal is to demonstrate the vendor's qualifications, competence and capacity to undertake services in conformity with the requirements of this solicitation. As such, the substance of the response will carry more weight than the form or manner of presentation. The proposal should demonstrate the qualifications of the vendor and of the particular staff to be assigned to this engagement.

**PROPOSALS MUST BE RECEIVED AT THE TRANSPORTATION LEARNING CENTER,
8403 COLESVILLE ROAD, SUITE 825, SILVER SPRING, MD 20910.**

**ELECTRONIC COPIES OF THE PROPOSAL CAN BE SUBMITTED TO:
JOYCE.WILLIAMS@TRANSPORTCENTER.ORG**

Section E: Center's Travel Policy & Procedures Manual

The Transportation Learning Center has developed this travel policy with three primary goals in mind:

- To make travel reservations promptly, in order to reduce the cost of travel when possible.
- To ensure that employees know what expenses are allowable and how to be reimbursed for expenses when necessary.
- To allow the Center to file timely invoices with its funding agencies based on prompt submission of travel reports and supporting receipts.

Part 1 – Pre-Travel Approval Process (Center Staff and Contractors)

- All Center staff and contractors traveling more than 15 miles from the Center or the contractor's home (whichever is closer to the destination) must go through a two step process for approval.
- Contractor will email their supervisor within 21 days of travel date requesting travel. The email should include date of departure and return, grants to be billed, and purpose of travel.
- Supervisor will reply to contractor and Travel Coordinator that travel is approved or denied.
- This written documentation will become part of the employee's expense report.

Part 2 – Pre-Travel Coordinating Process

- Center contractors may book their own travel or request the assistance of the Travel Coordinator. If they choose to make their own travel arrangements, contractors must notify the Travel Coordinator of their travel plans when travel is booked. Travel should be booked as early and as cost effectively as possible. If the contractor chooses to have the Travel Coordinator book travel, then the process below must be followed.
- The process for booking travel through the Travel Coordinator is as follows:
 - Travel Coordinator will email proposed travel arrangements to the employee for approval before reservations are booked, as well as confirm dates of conference or meeting attendance (as needed).
 - Employee will email reply back to confirm proposed travel arrangements & Travel
 - Coordinator will finalize booking arrangements.
 - Rebooking travel after acceptance will only be done if an additional trip has been added immediately before or after the original travel dates.

Part 3 – Cancellation/Changes of Accepted Travel Arrangements (Center Staff & Contractors)

- When travel has been approved by the supervisor and travel arrangements have been approved by the traveler, it is the traveler's responsibility to cancel or change all of the arrangements. This includes but is not limited to: airlines, train, rental car, hotel and conference registration. In addition, the Travel Coordinator and the supervisor must be notified by either phone or email of all changes. The Travel Coordinator may assist with changes or cancellations, if requested in advance by the Traveler.
- Unallowable Changes – The cost of changes made due to personal preference with no reasonable savings of time to justify employee cost, or missing transportation due to poor time management skills will be charged to the employee or contractor.
- If the traveler is ill or has an emergency, it is the responsibility of the traveler to cancel or change all hotel/air/train reservations and notify the Travel Coordinator. The Travel Coordinator can assist in cancellations or changes if notification is received either by phone or email prior to the time of travel departure.

Part 4 – Time Recording When Traveling (Center Staff & Contractors)

- Travel time and expenses start when an employee leaves either their home or the Center (depending on where they are located when travel begins). Time spent traveling is to be billed.
- A trip that will be split between two locations and two separate contracts should be split within each day of travel. The travel time to the first location should be billed under contract one. The travel time from location one to location two should be split between the two contracts, and the travel time back from the second location should be billed to the second contract.
- When in the travel location, the day starts when the normal workday starts. If there is a working breakfast, working time starts with breakfast. If there is a working lunch or dinner, time recorded should include that as well. A working meal is considered to be a meal where the employee's presence is mandatory. Breaks to go on non-work related excursions are not to be included in the timesheet for that day. Breaks to contact the Center's office or check e-mail are considered work related.
- If a trip is partially business and pleasure to the same location, the traveling time should be on your timesheet on the actual days of travel. The traveling time is still considered work time.

Part 5 – Approved Travel Expenses Incurred by Employee (Center Staff & Contractors)

- All staff and contractors of the Center are strongly encouraged to secure the most economical means of travel. This will usually involve at least a three-week advance booking for airlines and hotels. In all cases, the booking of travel should be made as early as feasibly possible. Excess costs due to unnecessarily late bookings may be questioned by the Center.
- If an employee books his/her own travel, then the responsibility for filling out the travel form for pre-travel expenses falls to the employee.
- *C. Forms & Receipts (Center Staff & Contractors)*

- It is the employee's responsibility to fill out the Center's expense form that details the expenses. These expense forms must include the following: Employee name, date of travel, time that travel began and ended, reason for the travel, proper billing of travel, amount of the charge, and backup for the charge.
- Reasonable care must be taken that all receipts are accounted for and are enclosed.
- Any receipt under \$50 that is unavailable will be reimbursed if the following is provided: date of charge, reason for charge, amount of charge, vendor. If/when the receipt is located; it should be filed with the appropriate expense reimbursement report. Unavailable receipts over \$50 will be paid at the discretion of the Center's Director.

Part 6 – Travel Expense Reimbursement (Center Staff & Contractors)

- The Center follows the government policies and procedures for travel reimbursement. Both costs and time in travel must be justified as reasonable. The current per diem and mileage schedules are found at their website (www.gsa.gov). The Federal government updates its per diem annually on October 1 and the Center follows these updates.
- Mileage for business travel in your personal auto is calculated on actual miles at the government mileage rate. Meals and incidentals are calculated on the Federal per diem rate in each individual locality.
- If the cost of lodging within a five mile radius of the destination exceeds the government lodging rate, the difference between the actual rate and the government lodging rate is considered an "unallowable" cost. In the event that lodging exceeds the government lodging rate, **supervisor permission must be granted in writing before booking. No unallowable costs will be reimbursed by the Center without advance approval.** This written approval will be included in the expense report documentation.
- A starting point for locating hotel rooms at the government rate is: www.fedrooms.com. Travelers are not limited to a certain website or company when booking travel, particularly if a lower rate can be found at a competitor's website.
- Reasonable tips for skycap, maid and bellman are not part of the per diem for the day. These costs are reimbursable and must be reported under tips, with the type of tip specified in the expense reports.
- Under government contracts, alcoholic beverages are not reimbursable costs. These costs must be treated as "unallowable" costs. Separate bills should be used and paid personally by the employee.
- All expense reports should be turned into the Travel Coordinator.