

TRANSIT BUSINESS SERVICE REVIEW CONSULTANT TERMS OF REFERENCE

Introduction

Guelph Transit is a public facing service that provides transportation services to an average of seven million riders annually. This service has been chosen to undergo a business service review in 2018. This business service review, conducted utilizing the Council approved business service review framework¹, will examine the relevance, effectiveness and efficiency of Transit services to ensure resources are allocated to achieve the best outcomes for the City and to support long-term sustainability. The review will examine the processes involved in providing this service to identify improvements for effective and efficient delivery of the service as well as reviewing alternative service delivery methods.

The City is seeking a consultant(s) with extensive experience in the public transit industry, with a focus on municipal transit services to support the business service review in areas of benchmarking, best practice research and alternative service delivery assessments.

Scope of Work

This assignment will include conducting research on best practices (benchmarking) from similar municipalities as identified by the City as well as supporting the assessment of alternative service delivery options for Transit services. The work to be conducted includes completing a screening level review of the existing system and the benefits, risks and impacts of alternative methods to deliver Transit services. Elements that are deemed acceptable will be screened out and elements that require further investigation (in consultation with City staff) will be identified. For areas that require further investigation, technical analyses will be conducted and summarized. The work outlined in the tasks below is to be completed collaboratively with the City.

For the purposes of this project (scope of review) Transit services includes Operations (conventional, mobility and specialty) and Administration (planning, scheduling, processes for fare and route reviews, and customer service). The assessment of alternative service delivery will include;

- Rationalization of service (Should the City of Guelph provide the service)
- In-house provision of service (City of Guelph staff provide the service)
- Outsourcing (City owns the service and contracts it out to an external organization)
- Partnership (City partners with an external organization)

As with any municipal setting, the stakeholder groups include staff, public, and various committees and boards, all of which have diverse interests and needs that must be considered. This process will involve extensive consultations, both with internal and external stakeholder groups.

The consultant will be expected to provide content and collaboration support, to assist City staff with the preparation of all required public notification and media outreach, as well as internal organizational communication. The responsibility of implementing the required tactics of the community engagement

¹ *CS-2016-61 Business Service Review Framework (October 2016)*

approaches will be led and facilitated by the City with collaboration, input and support as required from the consultant.

It is essential that any tools or benchmarks be developed in-line with industry best practices, as well as the needs expressed by the stakeholder groups.

Project Tasks

The following is a summary of the desired project tasks and deliverables

Task 1:

- Project Initiation/Scope Review Workshop
 - At the onset of the project, a project initiation meeting will be scheduled in order to provide introductions, review the project scope, milestones and key deliverables, and review the project management plan (with a particular focus on WBS items and descriptions). During this meeting, the City's approved Service Review Framework will be reviewed to understand the guiding principles for the work described below.
- Meetings:
 - One (1), 2-hour meeting at City Hall with the City staff to review the work program, schedule and deliverables (project kick-off meeting).
- Deliverables:
 - One (1) draft and one (1) final digital (PDF and .DOCX) project management plan.
 - Signed copy of Contract.
 - One (1) DRAFT and one (1) FINAL digital copy (PDF, PPT and .DOCX) of the agenda, presentation, and minutes.

Task 2:

- Benchmarking/Best Practice Research
 - This task will include a comparison of benchmarks with 5 comparable municipalities and organizations, as well as a review of best practices related to the provision of transit services. The consultant is to provide analysis of key service criteria including, levels of service, performance measures (customer and technical), financial measures (such as cost of service, funding sources and levels and fares). Data should be supplemented as necessary by other publicly available sources.
- Workshop
 - One two (2) hour Interim Workshop to review the results of the benchmarking and best practice review with the City's review team.
- Deliverables:
 - One (1) summary digital worksheet with all comparator data (.XLSX)
 - One (1) summary digital draft report of benchmarking and best practice review (PDF and .DOCX)
 - One (1) digital agenda, presentation and minutes (for each workshop)
 - Interim workshop will identify areas requiring further investigation

Task 3:

- Additional Investigations
 - Further investigation will be conducted on elements of the service identified in task 2. This may require supplementary data gathering from previously contacted comparators and/or additional comparator selection.
- On-site Municipal Visits
 - The City may choose to conduct site visits (maximum of 2) of municipalities or organization, from the comparator group used in Task 2, that are considered highly relevant to the review. The consultant will, where appropriate, identify candidate municipalities and organizations for these visits, arrange and accompany City staff and facilitate discussions.
- Workshop
 - One two (2) hour Final Workshop to review the final draft report and results of additional investigations and alternative service delivery.
- Deliverables:
 - One (1) revised summary digital worksheet with all comparator data (.XLSX)
 - One (1) revised summary digital draft report of benchmarking and best practice review (PDF and .DOCX)
 - One (1) digital agenda, presentation and minutes (for each workshop)

Task 4:

- Alternative Service Delivery Option Review
 - A review of alternative service delivery methods will be completed for elements of Transit services. These services and alternative service delivery options will be identified with the City review team. The assessment of alternative service delivery options will include some or all of the following;
 - Rationalization of service (Provision of service or no)
 - In-house provision of service (City of Guelph staff provide the service)
 - Outsourcing (City owns the service and contracts it out to an external organization)
 - Partnership (City partners with an external organization)
- Deliverables
 - One (1) summary digital draft report of alternative service delivery review (PDF and .DOCX)

Task 5:

- Reporting
 - Incorporate the output of all tasks into a final report. Key aspects of the report will be performance to benchmarks and best practices, identified alternative service delivery options for management review and identification of service elements that are efficient and economical as well as areas where proposed service changes would impact upcoming budgets. The report will also document the approach and findings and (if necessary) recommend next steps.

- Meetings:
 - Attendance at the Committee of the Whole and Council meetings in January 2019 for reporting on results. This could be either during the day or in the evening for 4 hours.
- Deliverables:
 - One (1) digital agenda, presentation and minutes (PDF, PPT and .DOCX)
 - One (1) digital draft and final report (PDF and .DOCX)

Coordination of Work

The consultant is required to prepare and submit a detailed work plan including a Project Schedule which indicates Project milestones and deliverables.

Once the Project Schedule has been finalized by the City and the Consultant, the City will use the Final Project Schedule to monitor the progress of the project and it must be updated and resubmitted monthly to the City’s representative.

The Project Schedule must be structured in conjunction with the key milestones in **Table 1**.

Milestone	Target Deadline
Contract Award	April 2018
Project Kick Off Meeting	April/May 2018
Benchmarking/Best Practice Review	July/August 2018
Summarize Findings	July/August 2018
Additional Investigations	August /September 2018
Alternative Service Delivery Option Review	September 2018
Final Project Report	October 2018

Table 1: Milestones

Project Management

The project is to be managed in accordance with project management best practices. Prior to the project initiation, the successful consultant should provide a draft project management plan which should include at a minimum:

- Project Management Approach;
- Project Scope;
- Milestone List;
- Schedule Baseline and Work Breakdown Structure;
- Cost Management;
- Project Scope Management;
- Schedule Management;
- Quality Management;
- Staffing Management;
- Resource Calendar;
- Cost Baseline;
- Quality Baseline; and
- Acceptance.

Project Progress Reports and Communication

At the sole discretion of the City’s representative, the consultant at any time may be requested to furnish a progress report with regards to the Project. Draft reports and deliverables are required prior to submitting

finalized documents for review. The City will endeavor to review all draft reports and deliverables, and provide feedback within two weeks of submission.

At a minimum, the consultant shall provide project progress reports on a monthly basis and/or with each invoice submitted.

Clear and timely communication is considered an important component of the successful completion of the Project. Throughout the Project duration, it is expected that the consultant provides a response and/or acknowledgement to email and telephone inquiries within 24 hours of the correspondence.

The consultant is expected to communicate with the City at key points through the project to ensure it is progressing in line with the City's timeline expectations. The consultant is responsible for identifying in their proposal what communication they feel is necessary to meet these needs.

The consultant is expected to attend Council meetings, related to the Transit service review, to support staff with answering any questions on the project. (City staff will make Council presentations.)