September 6, 2019

Subject: Request for Proposal (RFP) No.: 35116  
Culture Change Program  
Addendum No. 2

Dear Sir/Madam:

This Addendum No. 2 is being issued to correct, amend, add and/or delete certain words, phrases, sentences, or paragraphs and to provide Metra’s response to questions submitted for Metra’s RFP 35116 - Culture Change Program.

This Addendum No. 2 shall become part of the RFP and be incorporated into your proposal submittal. All addenda are to be acknowledged on page 24 of the Professional Services Agreement. Failure to acknowledge addenda may at Metra’s option disqualify the Proposal.

The Proposal Date is September 27, 2019 at 4:00 P.M. at 547 West Jackson Blvd., Chicago, IL, 11th Floor - Room 1100. Should you require any additional information, please contact Toyla Rice, Senior Contracting Agent at 312-322-6672 or trice@metrarail.com.

I. QUESTIONS AND ANSWERS

Question 1: We anticipate the professional fees for the first year of work for the project you outlined in your RFP being at least $500k. Is that aligned with your expectations? If not, what budget range should we work with?

Metra Response: Metra has not established an expected budget range. Fee proposals will be considered based on the value of the services to be rendered and as negotiated. Proposers may elect to provide a tiered pricing approach. For example, services your firm could provide at a lower, mid-range and higher price point.

Question 2: Who would be our primary client (functional team)?

Metra Response: Human Resources (HR) is the lead department for this project, however the “functional team” will consist of representatives of all departments at Metra.

Question 3: What caused you to want to evaluate your culture? Why did you send the survey?

Metra Response: The Board of Directors named a new CEO in January 2018 whose strategy is to implement changes such as: improving safety, finding efficiencies, strengthening technology, increasing customer service, and developing employees. The 2018 culture survey referenced in the RFP was a way to get feedback and ideas from all employees.
Question 4: What communication channels do you currently have in place? Which are most effective?

*Metra Response:* Metra employees are located at a number of facilities based on the work they do; some have email and internet access and others, mainly the operations employees who work out in the field, do not. Therefore, it is necessary we use a number of channels to regularly communicate with employees. All-staff emails are effective for managers and employees in the corporate office, and many of these departments also have regular standing meetings. Visual information network monitors are located at most facilities in lunchrooms and common areas. Director’s bulletins, posters, and bulletin boards are used at all facilities; and field employees hold daily safety meetings where safety and other pertinent information is shared.

Question 5: What is the size and structure of your communications function?

*Metra Response:* Metra has a department that works on external communications; there is not a separate internal Communications Department, though various departments have dedicated individuals who contribute to the communication outlined in question 4. The HR department will provide and support any communication around this project.

Question 6: Exhibit 1-A. Section III. From a culture perspective, has Metra defined the ideal attributes of the desired culture (what success looks like) or would you be looking to partner with the agency to work with you to define them.

*Metra Response:* In alignment with Metra’s Strategic goals, our CEO identified several areas of focus to update, develop, and refresh the current Metra culture: improving safety, finding efficiencies, strengthening technology, increasing customer service, and developing employees. Through continued data collection, Metra is expecting the partner to work with us to further define success in each of these areas.

Question 7: What does success of this program look like? How will you measure success?

*Metra Response:* See question 6. Metra identifies success as building a culture that supports the CEO’s long-term strategy. See EXHIBIT 1-A Section III for improvement areas that would demonstrate success. Metra is relying on the vendors to provide a program/project plan that further outlines opportunities to implement positive changes in Metra’s culture. We expect that plan to include specific and measurable recommendations and actions that Metra staff can take in support of the changes.

Question 8: What is most important to you in a partner for this work? Please outline your process and timeframe for selecting that partner.

*Metra Response:* Subject matter expertise, experience with like organizations, the ability of the partner to truly understand and accept our current state and assimilate the transformation plan so the majority of our current staff will embrace (or at least accept) the changes. See EXHIBIT 1-A in RFP for details on the submission and selection process. The timeframe for contract award is late first quarter of 2020.

Question 9: When do you anticipate this work starting?

*Metra Response:* Late first quarter of 2020 or second quarter 2020.

Question 10: General: Are there other cultural change programs that have been introduced in the past that were popular or remembered? Are any currently occurring in smaller areas with specific divisions or teams?

*Metra Response:* No. None have been introduced in the past.
Question 11: Exhibit 1-A: While we understand that channel assessment and recommendations will be part of the project, can you give us insight on what channels you rely on today that are successful? Meaning employees and staff use them? This could also include standing meetings or less formal channels.

Metra Response: See response to question 4.

Question 12: Exhibit 1-A: Section III: Was there a specific reason or event that prompted the 2018 survey? Was it the first of its kind, or were there others in the past?

Metra Response: Please see response to question 3. This is the first culture survey. We’ve had engagement surveys in the past.

Question 13: Exhibit 1-A. Section VI. Can you give insight into the current state, size and areas of focus of staff dedicated to communications and culture? How many are dedicated and how do you envision the day-to-day contact with the agency vs. the overall sponsors.

Metra Response: Human Resources (HR) is the lead department for this project, and several HR employees are dedicated to communications and culture in the work that they do. There is a program manager dedicated to culture change and the communications supporting that change. This person works on-site full-time and will be your primary contact throughout the project. There will also be communications support via the HR department. Metra expects that the initial two years will require more day-to-day consulting time than the following years. The CEO is sponsoring this program; daily contact with him is unlikely. We will define other contact requirements based on the program plan submitted by the selected consulting firm/partners.

Question 14: Who would be our main point of contact for the duration of the project? What is this person’s role within Metra?

Metra Response: Please see response to question 13. The role of the project manager is as a change agent; someone dedicated to managing the program.

Question 15: In terms of access, how available will our main contacts within Metra be for questions, approvals, and project related work?

Metra Response: The project manager will be available as needed to support this project. Proposers shall indicate what availability is assumed and/or required by Metra’s key personnel.

Question 16: In terms of next steps, what will the next phase be following proposal submissions? What types of documents need to be prepared if any in addition to the proposal? Will there be a pitch interview or an onsite visit?

Metra Response: See EXHIBIT 1-A in RFP for details on the submission and evaluation processes.

Question 17: What is the ideal (or expected) start date for the culture work to begin?

Metra Response: Please see response to question 8.

Question 18: Can you provide insight on the level of detail needed in the project plan for the purposes of this proposal?

Metra Response: Please see EXHIBIT 1-A, Section VIII. Deliverables and Section XVI. Evaluation Criteria.
Question 19: Can you provide additional information on the previous efforts towards organizational development that Metra has taken? Specifically, were employees segmented (by department, tenure, etc.) in the 2018 assessment? As well as, any further information you can provide about how many focus groups were conducted, what were the topics discussed, what levels of leadership were involved in these groups, etc.

Metra Response: Metra participates in many aspects of organizational development. For example, we offer professional development and safety training classes, as well as manager certification. We have a reward system in place that acknowledges employees who go above and beyond, and we have a holistic standpoint on wellness. However, Metra has not created or implemented formal culture change programs in the past. The 2018 assessment requested employees provide department-level information, specifically their department location and district or division. Survey results were sorted based on department. There were eight focus groups and a total of 64 participants.
  o Discussion topics included:
    ▪ Data and common themes from the culture survey.
    ▪ Validating the survey results with the focus group participants.
  o There were two focus groups of executive/director level participants; the remaining sessions included managers and staff-level participants.

Question 20: In the RFP, it is stated that the level of involvement will be 90% in the first year. Can you provide more clarification on what this means? Is it the level of involvement based on the total amount of work needed to be done or is this based on hours spent towards the program?

Metra Response: Metra expects that the initial two years will require more consulting time than the following years. The level of involvement is based on the work to be done and the amount of guidance Metra anticipates to implement the program.

Question 21: Do you have a budget or a range in mind for this program?

Metra Response: No. We are seeking expertise from potential partners on what a program like this would entail. See response to question 1.

Question 22: Can you provide clarification on the criteria used for selection? Specifically, if we don't have previous experience with companies around 3,000 employees is it still worthwhile to submit a proposal? How vital is this piece in the decision process?

Metra Response: Metra encourages any qualified firm to submit a proposal. All requirements will be factored in the evaluation of proposals, which are listed in order of importance.

Sincerely,

Alexis Karas
Department Head
Professional Services and Contracts