Request for Proposals

Shared Micromobility Services in Canadian Communities: Synthesis of Practice and Experience

Issued: January 23, 2023

Deadline for proposals: February 20, 2023, 13:00 ET

A. INTRODUCTION

Shared micromobility services involve fleets of small, fully or partially human-powered vehicles (e.g. bikes, e-bikes, e-scooters, and other mobility devices weighing less than 500 kg) that are available for shared use by members of the public. Shared micromobility services are either operating or being planned in many cities and regions across Canada, reflecting a range of service models from fully public to fully private, and diverse approaches to implementation.

The development of shared micromobility services is complex, and involves rapidly evolving technologies, varied regulatory environments, and varying perspectives on how to balance public and private interests. In the absence of a national-level synthesis of Canadian experiences, outcomes and lessons learned, many agencies have conducted independent research and adapted delivery models from other cities that may or may not be optimal for their context.

B. SCOPE AND APPROACH

This project will synthesize and document the experiences of Canadian organizations, so that they may be shared with others that are studying, planning, implementing or managing shared micromobility services. It will capture and communicate lessons learned from Canadian stakeholders about the various types of shared micromobility services, their roles within the growing spectrum of mobility options, where key opportunities exist for each, and how they can make transportation systems more efficient, effective, equitable, safe and sustainable.

The project will use surveys and interviews to gather information on policies, plans, programs and projects from experienced governmental organizations (municipal, regional, provincial and federal), as well as private and not-for-profit shared micromobility operators. Some organizations and individuals will be consulted in greater depth to leverage their knowledge and access to important resources.

Table 1 provides a list of topics that could be considered by this project. Note that a comprehensive investigation of each topic is not required in the final report; instead, priority topics will be determined through research, consultation, and discussion between the successful consultant and the Project Steering Committee. Bidders are requested to include in their proposal a preliminary list of priority topics that they consider to be most important to the Canadian context for shared micromobility services.

Table 1. Potential topics to be considered

PLANNING AND DEVELOPMENT PRACTICES	OPERATIONAL PRACTICES
Selecting an ownership/operating model – model type (e.g. municipal, contracted, permit, not-for-profit, fully private, open); bike vs. scooter; implications for costs, revenues, system design, outcomes **Planning for integrated transportation** – integrating with active transportation, transit and road networks; supporting mobility objectives (e.g. safety, equity, mode shift, congestion reduction, emissions reduction) **Determining scale of service** – size of service area; number of operators; size of fleet (e.g. number of devices, bike-to-scooter ratios for dual systems) **Engaging with stakeholders** – community involvement and outreach requirements (e.g. consultation on parking locations); educational/informational initiatives **Scheduling program delivery** – timelines for implementation (e.g. geofence planning, device implementation, parking, electrification) **Managing procurement** – stages and duration from request to full implementation; political inputs; permitting **Managing expansion/evolution** – based on industry changes, Council direction, community feedback, and usage levels, etc. **Respecting the regulatory environment** – provincial legislation and regulations; municipal by-laws **FINANCE AND GOVERNANCE PRACTICES** **Determining agency governance/organization** – ownership; partnerships; accountabilities **Projecting financial performance** – for costs (e.g. capital, operating, staffing, facilities) and revenues (e.g. user fees, sponsorship, advertising); considering the impact of land use context (e.g. urban, suburban), scale, device types (e.g. bike, scooter) and system type (e.g. docked, undocked, lock-to) **Cost and revenue sharing** – agreements between municipal governments and operators **Managing municipal liability** – insurance, risk management	**Parameters of operation** – hours (e.g. overnight); weather (e.g. definitions and operating procedures for cold, heat, snow, ice, wind); geofencing (e.g. effects and accuracy for low speed/no-ride/parking zones) **Enforcement, compliance and education** – roles of municipality and operator; targeting operator vs. users; spectrum of tools from education to penalties, fines, suspensions **Managing safety** – helmet rules and provision; other tools/approaches; injury reporting; understanding fire risk from electrified devices **Managing device parking** – parking area locations, sizes, designs (including electrification) and maintenance **Providing equity** – equity requirements; service area or operating strategies; access technology, payment and financial support options; training and partnerships **Universal design/accessibility** – devices; stations; user information **Designing pricing strategies** – membership strategies; rates (including levies, discounts, subsidies); modal integration; estimating impacts on usage (e.g. user/trip numbers, trip lengths) **Maintaining devices** – requirements and costs **Providing supportive infrastructure** – road/active transportation networks; design/maintenance standards and practices **ASSESSMENT PRACTICES** **Collecting, sharing and managing data** – governance; agreements; privacy (impact of provincial context, integration/provision of GBFS/MDS); standards; evaluation **Assessing outcomes** – social (e.g. equity, access); environmental (e.g. emissions from behavioural change, system operation, production; ecosystem or equipment lifecycle impacts); economic (e.g. job creation) **Internal and external reporting** – scope; benefits; key indicators of financial performance, user population (e.g. socio-demographics), usage (e.g. trip volumes, times, lengths, purposes, multimodal linkages), behavioural impacts (e.g. mode choice, auto ownership), other outcomes

The successful consultant will accomplish the above through key tasks that include:

- **A review of relevant literature** focusing on the Canadian context and experience (e.g. agency plans, case studies, news articles), and on international best practice guidance.
- **A survey of Canadian jurisdictions** to gather information on past, present or future shared micromobility policies, plans, programs, processes, services, outcomes and lessons learned, in addition to contextual information such as governing legislation or regulations. To ensure that jurisdictions with relevant experience are not missed, the survey will target up to 50 contacts to be identified through collaboration of the successful consultant, the Project Steering Committee, and TAC.
- **In-depth interviews and supplemental communications** with experienced Canadian organizations and practitioners. Proponents are asked to specify in their proposals a preliminary list of organizations to be interviewed, including but not limited to:
    - Municipalities, not-for-profit organizations and private companies with experience operating shared micromobility services – being careful to consult with communities of different sizes and geographic regions, and those having experience with different service models and micromobility devices)
    - Provincial and federal government departments overseeing policy/pilot programs to enable/support shared micromobility services (e.g. e-scooter pilot program, National Active Transportation Strategy)
- **Synthesis and documentation of lessons learned** (both positive and negative) regarding the planning and delivery of shared micromobility services in Canada.
- **Supplementary research** (as required and beneficial) to identify possible resolutions to notable Canadian challenges (e.g. lessons from northern Europe on operating shared micromobility services in winter).

C. DELIVERABLES

The main project deliverable will be a comprehensive but focused final report that synthesizes Canadian practice and experience in planning, delivering and evaluating shared micromobility services. The final report will include an Executive Summary, and will:

- Present a concise inventory of past, present or planned shared micromobility initiatives in Canada, with key operational statistics for each (e.g. service model, device/equipment types, number of operators, service area size, fleet size, usage, public capital and operating costs).
- Introduce key topics of interest to Canadian stakeholders that emerged from the surveys and interviews, explaining why they were selected from the long list of possible topics.
- For each key topic, present a synthesis of Canadian practice and experience that highlights:
    - The range of observed approaches, noting the opportunities and challenges arising from those approaches in different contexts
    - Priority approaches based on experience, highlighting any that depart from international best practice (e.g. from NACTO, North American Bikeshare & Scootershare Association, northern Europe); and
    - Implications/considerations for shared micromobility service performance, policy and/or regulation at local, provincial or federal levels

Other deliverables will include:

- Technical memoranda documenting findings from the literature review, survey of Canadian jurisdictions, and in-depth interviews
- PowerPoint decks to accompany 20-minute presentations to TAC's Mobility Council and Mobility Management Committee, and a 30-minute TAC webinar presentation.

All deliverables will be in English and in electronic formats (Word, Excel, PowerPoint and/or PDF) using templates to be provided by TAC where applicable. French translation will be the responsibility of TAC.

D. SCHEDULE

The consultant should propose a project schedule that enables high-quality deliverables, ideally adhering to the following milestones (with divergence permitted if a supporting rationale is provided):

- Contract award ..... March 2023
- PSC Meeting #1 (online) – project kickoff, discussion of proposed work plan and schedule ..... March 2023
- Submission of 20% draft report (annotated outline) plus draft memoranda on literature review and jurisdictional survey .....June 2023
- PSC Meeting #2 (online) – discuss 20% draft report and memoranda.....June 2023
- Submission of 50% draft report and memorandum on in-depth stakeholder interviews ..... September 2023
- PSC Meeting #3 (online) – discuss 50% report and memorandum ..... September 2023
- Submission of 90% draft report .....January 2024
- PSC Meeting #4 (online) – discuss 90% report .....January 2024
- Submission of 100% draft report and summary deck..... March 2024
- PSC Meeting #5 (online) – discuss 100% draft report and deck ..... March 2024
- Presentations to Mobility Management Committee and Mobility Council (online) ..... April 2024
- Submission of final report and summary deck .....May 2024
- TAC webinar delivery ..... TBD

The Project Steering Committee (PSC) will include about 15 representatives of project funding partners who will review and comment on all deliverables. The consultant will maintain a detailed log of comments and resulting actions for each deliverable. Generally, a minimum of 15 working days is required for PSC members to review deliverables before meetings. The consultant's team leader must attend the PSC meetings noted above and may be asked to attend other online meetings.

E. BUDGET

This project's maximum budget is **$85,000** for all fees and expenses, not including applicable taxes. Proposals exceeding this maximum budget will be disqualified. Proposals are expected to be fixed-price, and price will not be a factor in their evaluation. Proposals must include a detailed cost breakdown. TAC will not accept invoices for cost overruns (fees or expenses) associated with the original scope of work.

Invoices must link billing amounts to the percentage of completion of major tasks. TAC will retain a 10% holdback from each payment until the final deliverables have been accepted by TAC and approved by TAC's Mobility Council. All work conducted in the 12 months leading up to March 31 of each year must be invoiced by that date.

F. PROPOSAL REQUIREMENTS

Proposals should provide the following information:

- *Project understanding.* Demonstrate a clear understanding of the project's scope and objectives, describe challenges that might be encountered in its execution and proposed measures to overcome them, and suggest a list of priority topics relevant to the Canadian experience (with brief rationale) that may inform the development of and/or emerge from the surveys and interviews.

- *Consulting team.* Identify a project leader and team members including subconsultants, describe their roles, and identify their experience on similar or otherwise relevant projects as well as any experience with TAC projects and processes. Although the working language for this project is English, the consultant will be expected to review literature and communicate with stakeholders in French as required; French-speaking consulting team members should be identified.
- *Methodology.* Describe major tasks, resources to be applied, key information sources, planned analyses, and possible limitations. Include a preliminary list of Canadian organizations to be interviewed for this project.
- *Schedule and resources.* Show the proposed person-hours for each team member by task, total fees broken down by task and team member, any expenses, and a schedule with key milestones and project deliverables.
- *References.* Identify three organizations for which senior members of the consulting team have conducted similar or otherwise relevant projects, including the organization's address and the name and telephone number of an individual familiar with the proponent's work. TAC reserves the right to request additional references.
- *Conflicts of interest.* Disclose possible financial or organizational conflicts of interest in conducting the project; for example, the proponent's ownership, relationships or proprietary rights and interests could be perceived as jeopardizing its objectivity. Identify mitigating strategies for any such circumstances.

Proposals should include:

- A covering letter (not more than two pages long)
- Table of contents
- Main body (not more than 10 pages long, with 12-point single-spaced text and one-inch margins)
- Additional pages for:
    - Project cost breakdown (one page)
    - Project schedule (one page)
    - Project team organization chart (one page)
    - References
    - Conflict of interest declaration
- Team member résumés (each not more than four pages long)

Note that any material exceeding these scope and length parameters will be deleted from proposals before evaluation.

G. PROPOSAL SUBMISSION

TAC's Project Manager (see Section I, below) must receive a PDF version of the proposal by email **no later than 13:00 ET on February 20, 2023.**

Email any questions regarding this Request for Proposals to TAC's Project Manager (see Section I, below) **by February 6, 2023.** Addenda with responses will be posted to the RFP page on TAC's website as soon as possible, but **not later than February 10, 2023.** Note that proponents are responsible to check for addenda.

H. PROPOSAL EVALUATION

Proposals will be evaluated using the criteria in the following table. TAC reserves the right to conduct telephone or online interviews of proponents.

Evaluation Criteria	Weight
Understanding of the project including its scope, objectives, expected priority topics, and desired deliverables	30
Demonstrated qualifications, experience and competence of the project leader and team members	25
General approach and methodology, including a preliminary list of Canadian organizations to be interviewed	25
Adequacy of work plan, schedule and resources to ensure quality and timeliness of deliverables	15
Team member experience with TAC projects and processes	5
TOTAL >	***100***

I. PROJECT ADMINISTRATION

A contract for consulting services will be established before work can begin. TAC's Project Manager will be the liaison between the consultant and Project Steering Committee for this project and will work with the Project Steering Committee to review project deliverables and ensure objectives are met.

The working language for this project is English. TAC will be responsible for recording and distributing meeting minutes and maintains a secure online collaborative platform for sharing documents.

For more information, contact:

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