



Special Called Meeting of the Board of Directors Transformation Initiative Kickoff Meeting

August 7, 2020 | 8:30 a.m.

To be held by Zoom Video Conference

NOTICE IS HEREBY GIVEN that the members of the DCTA Board of Directors will be meeting via video conference using Zoom. The meeting will be made available to the public at the following web address: <https://zoom.us/j/92891388809> or by joining via telephone by dialing the following number: +1 346 248 7799; Meeting ID: 928 9138 8809

CALL TO ORDER

TRANSFORMATION INITIATIVE KICKOFF

1. Transformation Initiative Scope of Work and Project Management Approach

Discussion Item

Presenter:

Accenture – Chris Newport, Project Manager
Raymond Suarez, CEO

Item Summary:

Nicole Recker, VP of Mobility Services and Administration
Accenture will provide an overview of their approach to the 12-week Transformation Initiative, including but not limited to phases of work, staff support needed, reporting and project management. The DCTA Board of Directors will be asked to determine the type of reporting structure they prefer throughout the duration of the project, as well as provide directive to staff regarding project management.

Backup Information:

Exhibit 1: Transformation Initiative Original Scope of Work
Exhibit 2: Accenture Original Response
Exhibit 3: Accenture Best and Final Offer
Exhibit 4: Addition to Scope of Work

QUESTIONS/COMMENTS

ADJOURN

Board Members:

Dianne Costa, Highland Village, *Chair*
TJ Gilmore, Lewisville, *Vice Chair*
Sam Burke, Denton County Seat 2, *Secretary*
Cesar Molina, Denton County Seat 1
Chris Watts, Denton


Non-Voting Board Members:

Mark Miller, Ron Trees, Connie White, Carter Wilson, Tom Winterburn, Joe Perez

Staff Liaison:

Raymond Suarez, CEO

This notice was posted on 8/3/2020 at 4:14 PM.


Brandy Pedron, Executive Administrator | Board Support | FOIA

SCOPE OF WORK, TERMS AND CONDITIONS

The Denton County Transportation Authority (DCTA) is committed to improving mobility, air quality, economic development and livability in the communities where it operates. In collaboration with diverse stakeholders and partners, DCTA is a leader in advancing mobility initiatives to serve the ever-changing transit needs of riders. Formed in 2002 and funded in 2003 with a \$250 million infusion by Denton County and a commitment from the cities of Denton, Highland Village and Lewisville of a ½ cent sales tax, DCTA serves Denton, Collin and Tarrant County with a total of 22 fixed bus routes, the 21-mile A-train commuter rail line, on-demand, paratransit, and additional services. DCTA serves nearly 3 million passengers each year with connections to the Dallas Area Rapid Transit (DART) Green Line. To learn more about how DCTA is shaping the future of North Texas, visit RideDCTA.net.

2019 represented a year of positive change at DCTA which included meaningful modifications to: Board governance, staff leadership, culture, organization, and service delivery – actions necessary for DCTA to respond to evolving markets and the performance expectations of our stakeholders. Now, the newly formed DCTA Board of Directors desires to hire a qualified consulting team (the “consultant”) to perform an independent review of DCTA. The consultant’s report will help the Board develop a cohesive vision for DCTA’s future, improve operations, address perceived concerns, and respond to evolving markets, technology, and consumer preferences.

SCOPE OF SERVICES

This RFP seeks to engage a consultant with expertise in operational and long-range transit planning, strategic planning, information technology, process improvement, and organizational management best practices. This review will consist of four distinct, but integrated areas of emphasis: 1) service analysis, 2) governance analysis, 3) financial analysis, and 4) technology analysis. The report shall culminate with affirmative recommendations necessary to implement DCTA’s vision. The consultant team will be selected by, overseen by, and will report directly to the DCTA Board of Directors. This review will include, but is not limited to, the following components:

1. Service Analysis and Recommendations:

The service analysis shall include a review of all currently provided public transportation services, including the items below. Additionally, the selected consultant will critique existing DCTA operations against industry best practices, peer agencies, and missed market opportunities.

After evaluating the system, the consultant will comprehensively review DCTA, and provide an individual grade (A through F) for the individual factors below for the train system, bus services, and mobility operations provided in each member city and offer recommendations for improvement.

- a) Density – does the system connect areas of adequate density?
- b) Activity – does the system connect areas with activity -- employment centers, entertainment centers, or other destinations where people want to go?
- c) Connectivity – does the A-train connect well to DART, bus lines, and other mobility services?
- d) Walkability – does the infrastructure within a quarter mile of train stations and bus stations provide easy and walkable access for riders?
- e) Convenience – is the system convenient for riders?
- f) Frequency – does the system provide adequate ride frequency to promote ridership?
- g) Travel Time – can the system get riders where they want to go in an efficient time frame?
- h) Reliability – does the system run on-time and make reliable connections with transfers, where riders can rely on the system to get where they need to go?

- i) Legibility – is the website easy to use to plan trips? Can the average person know how to navigate a bus route or train route just by reading instructions at bus/train stops and by using instructions/maps found inside the train/bus?
- j) Inclusivity – do all members of the public have equitable access to the system?
- k) Conditions – does DCTA provide adequate shelters, benches and gathering places for the current stops in place or for those contemplated in the future?
- l) Perception – does DCTA provide an overall positive riding experience for its customers?
- m) Service Coverage – is the system providing adequate transit services inclusive of high-density areas, socio-economic diversity and Title VI requirements?

After providing a baseline grade for DCTA's current service, the consultant will then propose recommendations to improve the system and operation of the system. The selected consultant shall understand the services provided by DCTA's previously authorized contracts and make recommendations on which mobility solutions could be improved in DCTA's member cities. The recommendation shall provide:

- a) Analysis of the most cost-effective modes to provide desired levels of service and coverage
- b) Opportunities to increase ridership, including short, medium and long-term projects and each project's ridership potential. These recommendations should analyze both expansion of traditional service and the innovative solutions proposed by the previously authorized 30 firms.
- c) Opportunities to improve service and ridership in DCTA's member cities.
- d) A monitoring program of performance metrics that can provide continual feedback to the Board of Directors on service performance.
- e) Review of all modes of service, analyzing the cost to provide each mode, and the associated funding sources generated as a result of that service.
- f) Review of all contract service, and associated costs and revenues generated as a result.
- g) Analysis of the subsidy per rider of each route, in comparison to other similar size transit agencies.
- h) Identification of services or programs that should be considered for either modification or elimination due to unwarranted service levels/ ridership
- i) A return on investment index comparing the amount of money each member city contributes yearly and the number of riders served within that City (excluding passengers riding on A-Train traveling through the city without stopping or transferring within city limits).

2. Governance Analysis and Recommendations:

The governance analysis shall include, but is not limited to, a review and documentation of agency strengths, weaknesses, opportunities, and threats through interviews and facilitated group discussions with Board members, member city officials, community leaders, agency staff, and regional partners. The review and analysis shall include:

- a) A top-down organizational review of staffing structure, which should include a job description review and compensation study, comparing similar transit agencies, as well as Denton County and DCTA member cities. Benchmarking of all compensation factors should be part of the study, including retirement, health insurance and all provided benefits.
- b) Recommendations on organizational structure, best practices, and right size of the agency.

3. Financial Analysis and Recommendations:

Consultant shall review, provide analysis and make recommendations for the following:

- a) The agency's reserve policies.
- b) The agency's budget structure and monthly financial reports, including addressing the best way to budget for asset depreciation and replacement costs.
- c) The agency's existing Cost Allocation Model produced by the Texas A&M Transportation Institute.

4. Technology Analysis and Recommendations:

The selected consultant shall review the agency's information technology needs and processes and make recommendations to meet the future needs of DCTA.

5. Contract Term:

The initial term of the contract shall be for three (3) years with the option to renew for one (1) additional two (2) year term.

DCTA AGENCY TRANSFORMATION INITIATIVE

April 17, 2020





April 17, 2020

Ms. Athena Forrester
Denton County Transportation Authority
1955 Lakeway Drive, Suite 260
Lewisville, Texas 75057

Dear Ms. Forrester:

On behalf of Accenture and our teaming partners, Cambridge Systematics and Segal Consulting, I am pleased to submit our proposal to Denton County Transportation Authority's (DCTA) RFP 20-11: Agency Transformation Initiative. We recognize just how important this RFP will be to a sustainable future business model for DCTA and are excited about the prospect of being your partner in this effort.

The financial situation facing DCTA today is much more challenging than it was a few weeks ago when you issued this RFP during this time of unparalleled disruption caused by COVID-19. Public transportation has been particularly hit hard by the pandemic as people practice social distancing and economic activity continues to slow. Furthermore, tax revenues and other subsidies will be significantly impacted as well.

DCTA may have to make previously unimaginable decisions as you move to financially recover. Our Proposal will take into consideration a review of public transit agencies across the country, and the ways that they are handling this crisis. Given the COVID-19 situation, ***we will include an assessment of strategic cost optimization opportunities at no additional cost to DCTA as a sign of our desire to partner with you on this important undertaking. We also have an internal team dedicated to identifying ways our clients can utilize Federal CARES Act and other funds, including FTA Section 5307 funds. The Accenture team will recommend opportunities to maximize DCTA's utilization of funds allocated to the Denton/Lewisville UZA.***

We understand and appreciate that DCTA seeks an independent review of its service, governance, financial, and technology functions. This review is part of a cohesive vision for DCTA's future: providing equitable connectivity and mobility for citizens, enhanced delivery of transportation services, increased operational efficiencies and integration with plans aimed at expanding service connectivity and coverage to improve the quality of life for residents of Denton, Highland Village, and Lewisville.

DCTA needs a consulting partner who not only understands public transportation, but also recognizes its impact on the social and economic fabric in which it serves. Accenture brings a demonstrated track record to holistically support DCTA's journey to high performance.

Accenture takes every client extremely seriously, regardless of size and scope. Each transit agency is unique. Whether it is demographics, geography, financial capability or growth, there are critical decisions to be made that determine success. There is no "one size fits all." For that reason, Accenture uses both a top down and bottom up approach, that brings the best of our experience, insight and innovation, along with a detailed, personal and granular understanding of the client. Our philosophy places collaboration at the center of the way we work.

We are uniquely positioned to help DCTA achieve above and beyond its strategic and operational goals because we bring the following differentiators:

- **Team with deep local knowledge and a national reach**—Highly qualified project team and a national network of subject matter advisors in leading practices for public modern transportation agencies.
- **Experience that counts**—Extensive experience with public sector organizations, including developing local government and transportation agency transformation plans.
- **Commitment to DCTA goals**—Understanding of the mission-oriented goals and priorities of DCTA inspiring this initiative: commitment to improving mobility, air quality, economic development and livability through prioritizing safety, accountability, commitment, excellence, integrity and respect.
- **Innovation that works**—Transformational consulting capabilities to facilitate design-thinking workshops and field-tested methodologies tailored to meet DCTA's needs.
- **Outcomes that matter**—Commitment to producing results, not just reports, for DCTA's employees, board, and ridership in a format you can use, with regular updates throughout the process to guide each phase.

We welcome the opportunity to work together with DCTA, its Board of Directors, and the representative member cities to continue DCTA's progress on building a legacy of service, transparency and innovation into DCTA's future.

We are committed to serving as a valued partner during this challenging time, to be there for you and collaborate in partnership through these difficult circumstances.

I am authorized to contractually obligate Accenture with this proposal and any future negotiations. For clarifications or additional information regarding this proposal, please contact me using the information below:

Company Name: Accenture LLP

Website: www.accenture.com

Address: 5221 N O'Conner Blvd, Suite 1400; Irving, Texas 75039

Name and Title: Rob Cohan, Managing Director

Email: robert.cohan@accenture.com

Telephone: 512-680-0560

Fax: 512-652-7246

At your service,



Rob Cohan, CPA

Managing Director—Strategy & Consulting

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1.0 History of Firm

The history of the firm should include how many years in business. A listing of any litigation, judgments, claims, arbitration proceedings, suits, bankruptcy, or reorganizations that may have occurred during the past five years.

Corporate Overview

Accenture LLP, established in 1989, is a limited liability partnership licensed to operate in all 50 states. Our company's history has been more than 60 years in the making—from the earliest days as a pioneer in the new world of information technology in the 1950s to its position today as a Fortune Global 500 industry leader. Our clients are the world's leading companies and organizations as well as government agencies. Accenture serves 91 of the Fortune Global 100 and more than three-quarters of the Fortune Global 500. Figure 1 provides a snapshot of our services.

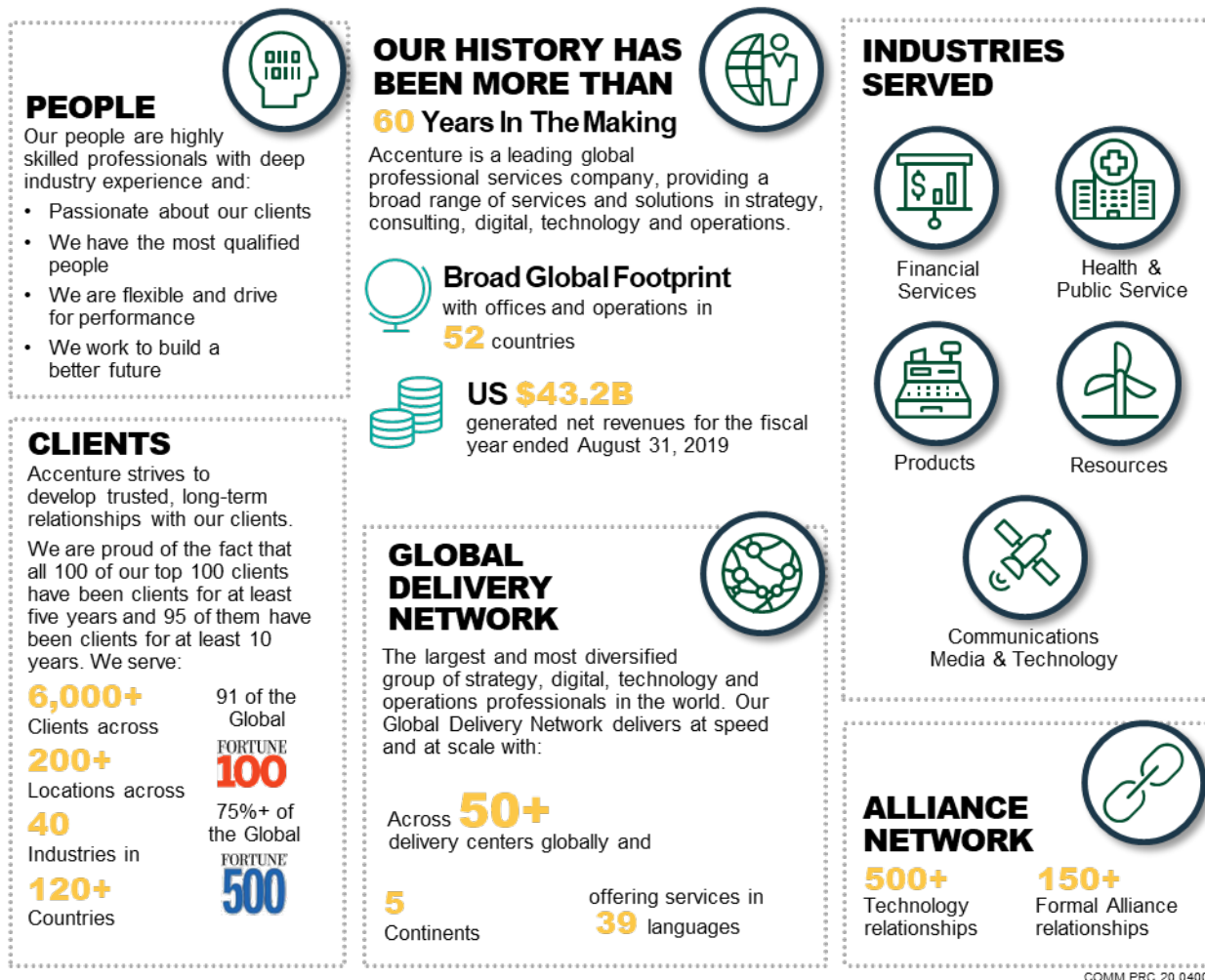


Figure 1: Accenture Overview

Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy and consulting, interactive, technology and operations. Combining unmatched experience and specialized skills across industries and business functions—underpinned by the world's largest delivery network—Accenture

works at the intersection of business and technology to help clients improve their performance and create sustainable value for their stakeholders. Today, with more than 505,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives.

We help public sector and transit clients—like DCTA—**improve operational performance, deliver services more effectively**, and take advantage of the opportunities and **promise of digital technology**.

DCTA's RFP asked about litigation and legal proceedings. Litigation involving every type of professional services firm, including consultants, has become commonplace over the last two decades worldwide. The number of such situations worldwide in which Accenture is involved is minuscule in relation to its total number of clients. The ultimate outcome of any pending litigation will not adversely affect Accenture's ability to provide the services described in this RFP.

Any significant legal proceedings involving Accenture would be disclosed in our filings (10Ks, 10Qs, and Annual Reports) with the Securities and Exchange Commission; these filings can be accessed at <http://www.sec.gov/cgi-bin/browse-edgar?action=getcompany&CIK=0001134538>.

While termination is extremely uncommon, there may be circumstances where an agreement or statement of work is cancelled due to a change in the client's business direction, financial positions, or management. Accenture typically enters into contracts with our clients that provide for standard mutual termination rights.



Cambridge Systematics, Inc. was founded in 1972 by four Massachusetts Institute of Technology professors and a colleague who shared an understanding that transportation's greatest challenges call for thoughtful, objective, research-based solutions. Their charter pledged "the application of systematic analysis to problems of transportation, the environment, urban development, and regional planning." CS has more than 45 years of experience leveraging technology and ingenuity to advance the world of transportation: planning and policy, movement of people and goods, software design and development, and, underlying it all, effective partnerships and objective analysis. We are recognized nationally and internationally as an objective source of pragmatic expertise applicable to a very wide range of transportation challenges and opportunities. Today, Cambridge Systematics remains an independent, employee-owned firm, recognized throughout the world as a leader in the field. The firm continues to specialize in transportation and to pioneer the development and implementation of innovative policy and planning solutions, objective analysis, and technology applications. Accenture will utilize support from Cambridge for the Service Analysis and Recommendations Task.



The Segal Group is a leading, independent firm of benefit, compensation, and human resources consultants since its founding in 1939. Segal is headquartered in New York, with more than 1,000 employees working in multiple offices throughout the U.S. and Canada. Segal brings extensive experience with Transit Districts (including DCTA) with over 50 transit and transportation projects in the U.S. providing independent, results-driven consulting services to public sector transit entities throughout the country. We added them to the Accenture Team to support the Governance Analysis and Recommendations Task (especially the compensation benchmarking work). Segal has provided consulting services to labor-management committees in transportation and/or the public sector, including: Bay Area Rapid Transit (BART) and AFSCME; City of Philadelphia (PA) and AFSCME; FOP and IAFF Massachusetts Department of Transportation and AFSCME; Massachusetts Bay

Transportation Authority—ATU; and the Washington Metropolitan Area Transit Authority (WMATA)—ATU and OPEIU Local 2.

Our Team in Texas

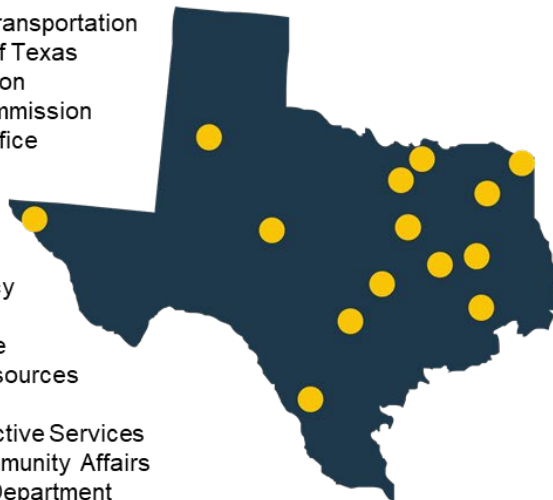
Accenture's main North Texas Office is located at 5221 N O'Conner Blvd, Suite 1400; Irving, Texas 75039. We also have a digital design studio at 1701 N. Market Street, and a Cloud Innovation Studio at 5605 N. MacArthur Blvd. We employ over 2,300 employees in North Texas, most of which are supporting clients on their individual innovation and transformation journeys. Accenture maintains offices in key locations across the State: Austin; Dallas; Houston; and San Antonio. We employ more than 8,600 Texans, many of whom grew up in the state, went to Texas schools for their education, and have strong personal ties to their communities. Our team has helped numerous Texas-based businesses and public service organizations achieve high performance. For more than 40 years, we have:

- Teamed with Texas businesses, governments, and nonprofit organizations to transform operations
- Helped upgrade and modernize mission-critical systems
- Introduced technology that transforms citizen services
- Supported Texas communities through charities and community service
- Used new technologies in a sensible, balanced manner to help clients accomplish more with limited resources

Along with our teaming partners, we collectively maintain a strong corporate record and longstanding presence in Texas. We bring deep, local knowledge learned from working with dozens of Texas state agencies and universities to modernize their processes and operations like DCTA's objectives with this Transformation Initiative. This collective breadth of experience across Texas is illustrated below in Figure 2.

Accenture Experiences:

- Texas Department of Transportation
- Railroad Commission of Texas
- Texas Water Commission
- Texas Public Utility Commission
- Texas General Land Office
- Texas A&M University
- Texas Tech University
- University of Houston
- University of Texas
- Texas Education Agency
- Dept of Agriculture
- Dept of Criminal Justice
- Dept of Information Resources
- Dept of Insurance
- Dept of Family & Protective Services
- Dept of Housing & Community Affairs
- Texas State Treasury Department
- Dept of Mental Health & Mental Retardation
- Texas Comptroller of Public Accounts
- Texas Office of Attorney General
- Texas Alcohol & Drug Abuse Commission
- Texas Workforce Commission
- Texas Health & Human Services Commission
- Employee Retirement System of Texas



Cambridge Systematics Experiences:

- Texas Department of Transportation
- Texas Commission on Environmental Quality
- Texas Turnpike Authority
- North Central Texas Council of Governments
- Alamo Area Metropolitan Planning Organization
- Capital Area Metropolitan Planning Organization
- El Paso Metropolitan Planning Organization
- Laredo Urban Transportation Study
- Houston-Galveston Area Council
- City of El Paso
- City of Laredo
- Austin-San Antonio Intermunicipal Commuter Rail District
- Capital Metropolitan Transportation Authority
- VIA Metropolitan Transit

Segal Experiences:

- Denton County Transportation Authority
- Harris County Transportation Authority
- City of Austin – Transportation Department
- Port of Houston Authority
- VIA Metropolitan Transit

Figure 2: Our Experiences in Texas

Our Team in Transportation

Accenture maintains a dedicated global industry practice focused on public and commercial transportation. Our group consistently invests in developing industry-specific points of view in collaboration with the Accenture Center for High Performance—our specialized unit of researchers and world-renowned authors. We recently completed a global study of public transportation agencies, *High Performance in Public Transport: How Authorities and Operators Can Go Beyond Their Traditional Outcomes*, addressing many of the same issues and trends DCTA faces today, such as how to provide greater mobility in the face of increased congestion, how to integrate transportation and urban planning in a more dynamic and sustainable way, and how to generate new revenue and become more cost-efficient in the face of constrained funding.



Figure 3: Our Transportation Industry Insights

Visit www.accenture.com/publictransport to access any of our recent points of view.

Accenture's transportation practice brings together over 1,000 professionals worldwide, serving more than 60 clients with similar challenges, best practices, and innovation ideas to share as highlighted in Figure 4.



Figure 4: Accenture Transportation Experience

Extensive experience in public and private transportation equips us with the knowledge and skills to help our clients become high performing organizations in a complex and challenging industry. We approach our work with customer experience and operational excellence foremost in our mind and help transportation clients work with their stakeholders to continuously improve as customer expectations evolve. The practice has helped these transportation clients make the changes necessary to improve their performance and service delivery.

Cambridge Systematics sets itself apart from its peers through their nationally regarded transportation specialization coupled with strong industry leadership and innovative solutions. By focusing exclusively on transportation, Cambridge offers clients a unique breadth and depth of industry knowledge and experience. We know the issues, stakeholders, data, analytical tools, and problem-solving processes involved in addressing transportation challenges.

Our outstanding practitioners represent a range of disciplines and have chosen to make their careers at CS. We attract and retain industry leaders in critical areas of specialization, including transportation finance, economic analysis, safety, freight systems, demand forecasting, asset management, performance measurement, public transportation, traffic operations, geographic information systems, energy and emissions analysis, sustainability, and integrated transportation-land use planning. CS has national, state, and local expertise in these areas; our staff work closely across these functional areas to address the most complex system policies and planning needs.

From assisting agencies in complying with new regulations to applying the latest in technology to collect and analyze travel data, CS excels in helping clients plan for and implement change. Although we are known for applying creativity and innovation to solve tough problems, we provide clients with practical solutions to their local needs, taking advantage of our national perspective and expertise.

And specifically, as it relates to DCTA and this Transformation Initiative, CS will be focused on finding the best solutions for DCTA clients. CS takes every aspect of a project into account—environmental, regulatory, political, economic, community—and work with our clients to meet their project goals. Our national research and frequent participation in independent audits and peer reviews provides us an objective perspective and approach to assessing problems and solutions.

Segal Consulting has offered human resources consulting services dedicated to the public sector, and specifically supporting 50+ transportation clients across the United States. Segal helps transportation organizations adopt a more strategic, comprehensive and integrated approach to total rewards that includes both financial and nonfinancial rewards. Given the demands for talent, Segal's consulting approach within transportation is based on customized solutions to meet specific needs, not “off-the-shelf” systems. Our goal is to maximize the value of total rewards by encouraging employee participation in our engagements. This is crucial to a successful outcome.

Segal conducted two projects for Denton County Transportation Authority (DCTA) including a classification analysis and compensation assessment of DCTA's base pay and benefits offerings for all employees. Our most recent study was conducted in 2019 and we think that for this project we can leverage much of that prior work in this study.

Our Transformation Approach

Transforming DCTA operations starts with understanding its organizational DNA to clarify the intent, purpose, and benefit of programs while helping improve accountability for achieving outcomes that matter. Organizational DNA manifests in its operating principles to determine the way work actually gets done. We know how to do this in

collaboration with our clients, ensuring no step is missed, and for the change to be authentic to the organization. We do this by following two critical philosophies in assessment and transformation projects, as shown in Figure 5.

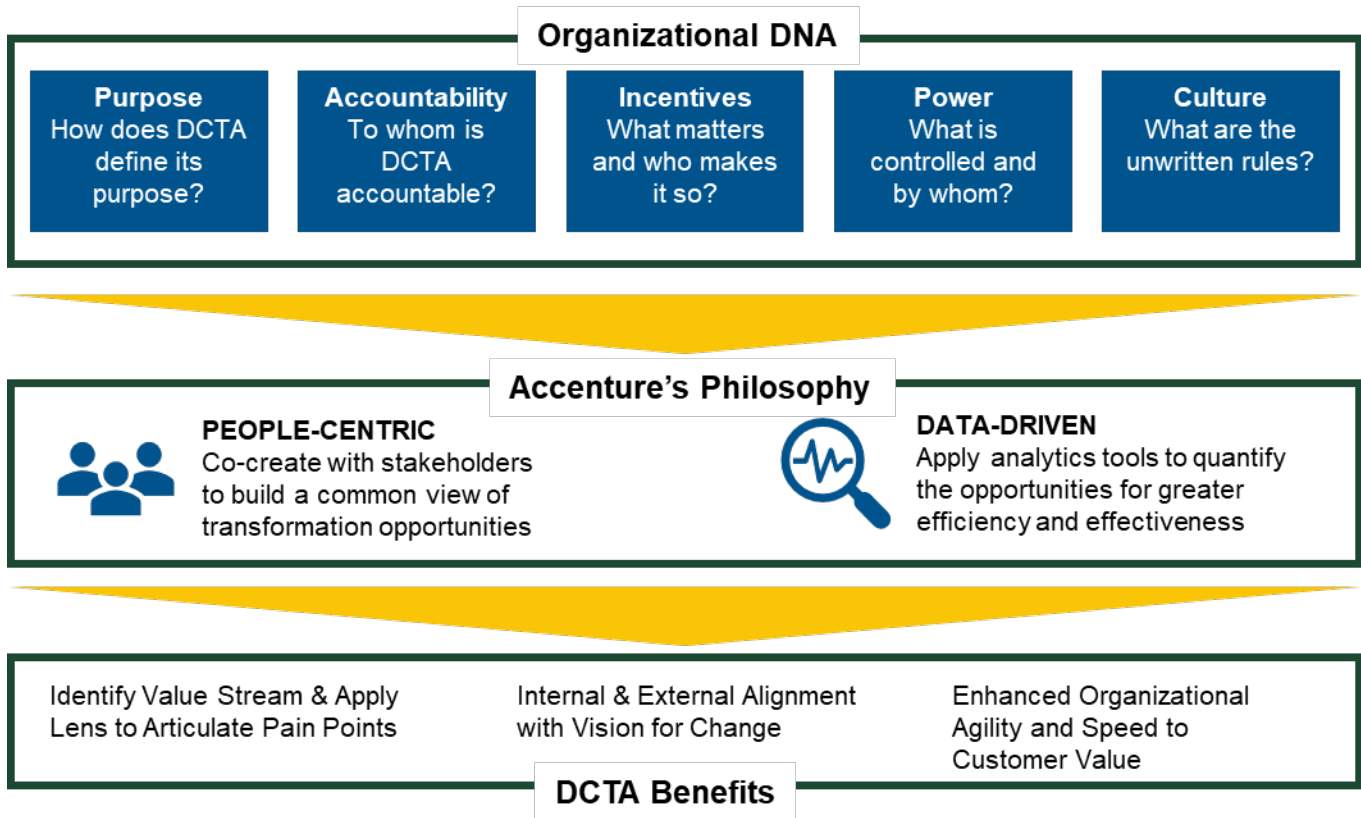


Figure 5: Critical Philosophies

First, the approach must be **people centric**. Benchmarks, tools, and standards are helpful but, first and foremost, they must enable DCTA to serve the unique needs of its customers. Second, we are **data driven**. Data helps remove bias and identify context-specific problems, find exemplars of best practice, and provide an evidence-based view on how DCTA services compare to other public transit agencies.

Our goal is to clearly trace DCTA's vision for serving its customers across its service operations, governance, financial, and technology functions by summarizing our findings and recommendations aimed at strengthening what is working, refining what can be improved, and defining what is new. Our deliverables will be concise, impactful, and actionable. We will work collaboratively with DCTA and its Board to confirm these viewpoints and use that feedback to inform and update each iteration of our approach as we assess the four main categories of focus.

Transformation Success Factors

Agencies targeting enterprise-wide changes must go beyond operational assessments and strategic plans to truly achieve a level of transformation. Often, these efforts are driven by short term imperatives but are unable to endure over the long-term. They become focused on metrics, measures and initiatives but lose sight of the broader mission. They are difficult to sustain and can lose momentum without dedicated leadership. Politics may impede effective prioritization and implementation. The workforce resists, sometimes passively but also very actively and vocally opposing reform. And these efforts often rely on someone from the outside (e.g., a consultant or community stakeholder groups) to point out the areas for focus and priority—but this “outsider” generally has limited real knowledge of how things actually work and almost always has limited skin in the game. However, risks can be mitigated, and transformative change can occur, when the process includes the following factors:

1

All of DCTA—not just the leadership team—is pursuing one common transformation: more efficient, equitable, and responsive service to DCTA customers and residents

The essence of a successful assessment is to create the capability for ongoing innovation toward this common agenda. This is not a “one and done” exercise; it is continuous. Most efforts quickly jump into Key Performance Indicator (KPI) dashboards or portfolios of initiatives. This approach may create rapid or visible, short-term gains but will fail to be truly transformational, as the fundamental, systemic challenges facing the organization will remain.

2

Transformation begins with articulating the organization’s aspirations for its relationship with those it serves—the results it would deliver and the experience of its residents

Goals for the assessment must directly support DCTA’s work and resonate with each function and employee across the agency. Understanding this effort in service of improving their ability to perform their jobs and fulfill their commitments will enable greater support throughout the process. Successful transformation programs focus on the multi-year portfolio of projects and enablers that make more efficient, equitable, and responsive service both necessary and possible.

3

Reviewing operations and developing roadmaps are important components in realizing DCTA’s vision, but delivery and sustainment necessitates financial support

In our experience, the most successful strategies are backed up by meaningful investments—in other words, budget initiatives mirror the strategy. We recommend DCTA and its Board consider how it allocates resources writ large to shift this project from an assessment document at risk of sitting on a shelf to a systemic approach for investing in outcomes. Otherwise, the assessment report, while honest in intent, lacks any real teeth for changing the outcomes for residents. Too often, budgets pay for costs rather than purchasing results or creating greater impact. DCTA can use its resources to support programs, contracts, and purchases that would deliver the most value for the money. Accenture calls this “Budgeting for Outcomes.” Budgeting in this manner makes every program in every part of the organization accountable for delivering better results at lower costs every year by realigning spending around investing in outcomes.

4

Internal barriers may appear in policy, procedure, or practice. DCTA should consider streamlining these frameworks, especially in administrative functions

DCTA can achieve dramatically more impact and operating efficiency by evaluating and reforming administrative policies that may constrain certain transformation opportunities. Within the appropriate legal, regulatory, and stakeholder constraints, each administrative policy should be evaluated against leading practice in such criteria as number of approvals needed, level of authority/delegation, documentation required, digitization, and more. While this activity is one-time and should occur early in the transformation, DCTA may consider retaining some level of ongoing capability to escalate and minimize bureaucratic barriers that may emerge during the assessment and initiative recommendations.

5

DCTA must ensure this journey is characterized by a culture open to continuous change, innovation, and experimentation

DCTA's work environment, stakeholder demands, and how DCTA meets those demands are changing. This is especially true in a transportation service area that is growing quickly and needs to respond to new challenges and opportunities while also addressing existing ones. Organizations need to continuously monitor those changes and remain open to how they are addressed.

Public agencies are understandably leery of experimentation. But, as technology and cultural change accelerates, it is required to keep pace. So, rather than avoiding experimentation with new ideas, methods, and goals to meet citizens' needs, DCTA should fully embrace it with the idea that they want to 'fail quickly.' In other words, try out new ideas quickly and at small scale in a low risk environment, and determine as soon as possible whether those ideas hold promise. The early winners can then be scaled to have a larger impact as appropriate, with the failures dropped.

Our ZBx Methodology

Accenture is the market leader in complex *cost focused transformations*. We have saved our clients billions of dollars while successfully restructuring their organizations to support their future growth. We literally wrote the book on cost transformation. Our "ZBx approach" is widely recognized as the most successful and tested approach to drive significant, sustainable cost reduction. Our methodology has four playbooks to address our clients' financial challenges:

- Zero-Based Organization (ZBO) to address headcount and drive process efficiencies
- Zero-Based Spend (ZBS) to address the non-headcount related overhead
- Zero-Based Supply Chain (ZBSC) to optimize operations and reduce direct costs
- Zero-Based Commercials (ZBC) to optimize pricing and revenue management.

The main challenge with traditional approaches to cost reduction—such as across the board cuts, hiring freezes, purchasing freezes, deferred maintenance, and reduction of travel—is that the impact isn't sustainable. Enduring enterprise-wide cost reduction requires a fundamentally new approach: a zero-based mindset. With a zero-based mindset, DCTA

The Big Zero

The Transformation of ZBB
into a Force for Growth,
Innovation and Competitive
Advantage

Kris Timmermans,
Chris Roark &
Rodrigo Abdalla

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would essentially forget about the past (e.g., funding decisions that have been made incrementally over time and driven by inertia) and reimagine its cost base not from what it is today, but what it “should cost” if you were to start from scratch. This positions DCTA to use the resulting savings to lower the cost of ridership and/or fund investments in distinctive capabilities that support its public transportation goals.

Our Zero Based Spend (ZBS) approach enables organizations to identify discretionary consumption of non-labor overhead expenses through a unique lens of granular cost visibility. Our integrated approach creates insights through data analysis, drives decision making, and establishes a long-standing governance structure enabling sustainment and continuous improvement. We have blended our zero-based approach with cutting-edge technologies and methodologies applied to four main cornerstones:

- **Speed, Accuracy, and Visibility:** Our integrated approach to data forensics and construction of baseline creates an insightful picture of “who-spends-how-much-on-what.” We utilize our spend visibility software, in conjunction with our ZBS visibility processes and our cost definition book repository, to provide a quick and accurate view of spend
- **Balanced Approach:** We will work to find the right balance of decisions between value created and cultural implications for a public transportation setting. We quickly identify opportunities for immediate impact, while developing a target list for the future.
- **Governance Alignment:** We support the alignment of business function owners and “spend category owners” to address issues, findings, and align on targets. We establish the right governance structure that is not over-bearing but collaborative and effective for the unique nuances of a client’s environment.
- **Sustainability:** Our ZBS approach creates alignment to a value commitment that will be embedded in the organization’s culture, promoting sustainable change. We create a clear path to an internal structure that harnesses the capabilities of various functions and professionals, ensuring the change is sustainable and adaptive.

Note: Accenture has included a strategic cost optimization diagnostic at no cost to DCTA as part of this project. Based on our initial findings from that work, we look forward to discussions with DCTA on how ZBx may be utilized in subsequent phases of a cost transformation program. ZBx requires a more extensive data analytic effort and a broader scope than the four major workstreams identified in the RFP.

2.0 Firm's Qualifications

List the qualifications of each member of the proposed project team. Provide the length of time each member has been an employee of the firm.

Team Structure

One of the most important elements of an effective project is having the right team. The right team must possess relevant knowledge, depth of experience, ability to balance competing goals, and effective collaboration across stakeholders. Our team recognizes that stakeholder input, communication, and quality of work products is crucial for conducting a comprehensive analysis and developing practical, actionable recommendations for DCTA and its Board of Directors. Additionally, an effective project team must be supported by proven methodologies to execute with consistency and at the expected pace. We have structured a team with extensive experience in public sector transportation and general management, to be supported by a panel of Subject Matter Advisors (SMAs) as outlined in Figure 6. Our staffing approach provides DCTA with highly experienced personnel across each of the key areas outlined in the Agency Transformation Initiative. Resumes for all core team members and summarized qualifications for SMAs are listed below.

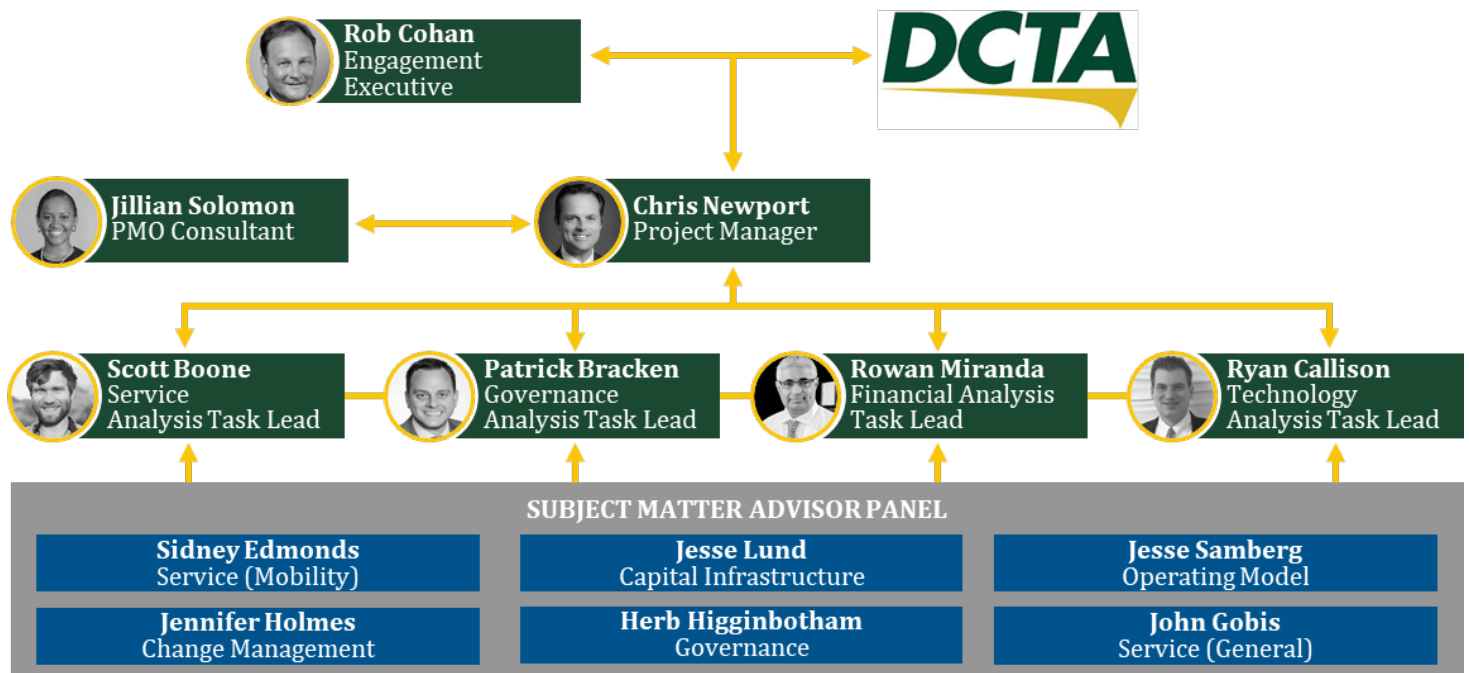



Figure 6: Proposed Organizational Structure


Qualifications of Team Members


Our dedicated project management team will work in an integrated manner, focus on bringing relevant data-driven insights and develop tailored recommendations to meet both DCTA's near- and long-term needs. We acknowledge in our workplan the substantial change DCTA has already undertaken, the evolving transit landscape and rapidly changing customer service expectations. In addition to the core team, we will utilize SMAs for a portion of the work who understand transit intimately and can help us develop an achievable transformation plan.


We are proposing Rob Cohan as the **Engagement Executive**. Based in Austin, Rob is accountable for the delivery of our blended Accenture team. In this role, Rob would participate in key interviews and executive briefings, and interact with DCTA and stakeholders to ensure your objectives are addressed. Rob brings decades of experience designing and executing transformational programs for complex public organizations and led similar work at Valley Metro. Rob has worked with the Cities of Austin, Dallas, Houston, and San Antonio, as well with both Travis County and Harris County to design, develop and implement strategies and capabilities that deliver better outcomes and improved results for citizens. Prior to his advisory and consulting work, Rob spent several years working for the Texas Senate Finance Committee, Texas State Auditor's Office and for John Sharp as the Texas Comptroller.


Chris Newport, our proposed Project Manager, would be responsible on the ground working hand-in-hand with DCTA leadership to deliver the outcomes of this project. As the Project Lead, Chris will be the "conductor" of the various focus areas and will be charged with coordinating to integrate and align each function in pulling together a cohesive set of recommendations. Chris will apply his experience in Harris County-Houston government and complex event executive management to effectively guide the completion of the assessments. He has spent his career focused on helping public service organizations deliver more value for the people they serve. In fact, Chris even once corralled a bobcat in downtown Houston parking garage.


|  | <div> <div>ROB COHAN</div> <div>ENGAGEMENT EXECUTIVE</div> </div> <p>Mr. Cohan served as a senior advisor and government services leader in transformation, planning, and implementation of programmatic, administrative and technology innovation for over 25 years. His experiences span performance management, program design, strategic planning, budgeting, procurement, organizational development, change management, and technology modernization. He has led engagements at multiple Texas agencies, universities, counties, and cities, including Cities of Houston, San Antonio, Austin, Dallas, Ft Worth, as well as Harris and Travis county.</p> |
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| <p>Accenture Tenure: 5 years</p> <p>Total Experience: 25+ years</p> <p>Education: B.A., Business Administration—University of Texas Certified Public Accountant (CPA)</p> <p>Functional Experience:</p> <ul style="list-style-type: none"> • Operating model design • Shared services development • Benchmarking • Performance management • Technology modernization • Private-public partnerships | <p>Valley Metro, Phoenix AZ: Led the business capability assessment and strategy engagement to review and benchmark the organizational, financial, operational, and technological capabilities of the Capital Service Development and Operational and Maintenance Center.</p> <p>City of Austin: Working with the Mayor, City Manager, CFO and City Council, led an engagement to develop a strategic planning framework and process for the City of Austin. Facilitated City leadership in developing the first outcomes based, comprehensive citywide strategic plan in 15 years, with strategies, measures, and metrics.</p> <p>Texas Department of Transportation: Led transformation and modernization project to update processes, technologies, and operational capabilities to modernize how TxDOT delivers capital portfolio and project planning, letting, construction and asset management capabilities.</p> <p>Texas Department of Transportation: Oversaw system planning projects addressing improvements in how IT services were delivered to customers and departments. Performed benchmarking analysis of IT functions, deliver IT leadership and executive support services, and participate in an ERP business case realization assessment.</p> <p>Texas Department of Motor Vehicles: Working with the Executive Director, COO, CFO and CIO, led a team to blueprint a new operating and service delivery model for providing DMV services as a stand-alone agency separated from TxDOT. Scope was a large enterprise transformation to address operations and legacy systems, front office functions, provide transformation, governance, sourcing strategies, model and planning for service delivery.</p> <p>Multiple Texas Cities and Counties: Served as Engagement Executive over multiple engagements at the Cities of Austin, San Antonio, Dallas, Ft Worth and counties of Harris and Travis in Texas. Work included strategic planning, operational assessments, technology planning and quality assurance, as well as financial and human capital management capability and process modernization support. Common challenge and opportunities addressed include aligning people, process, and technology to deliver more efficient, effective services in areas such as budgeting, procurement, HR, payroll, land management and development, revenue and taxation, and infrastructure.</p> |


| | <div> <div>CHRIS NEWPORT</div> <div>PROJECT MANAGER</div> </div> |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div>  </div> <div> Accenture Tenure: 1 year </div> <div> Total Experience: 19 years </div> <div> Education: M.B.A.—Rice University B.A., Economics—Trinity University </div> <div> Functional Experience: <ul style="list-style-type: none"> • Public Sector • Government Policy • Operating Model Design • Organizational Transformation </div> <div> Veteran, US Navy </div> | <p>Mr. Newport will apply his experience in government executive management to guide the completion of the work stream assessment and recommendation implementation plans. Chris' responsibilities will include advising the project team on citizen-centered service delivery in the local government context. He will interface directly with DCTA leadership and coordinate the team delivery of the first phase of this project.</p> <p>City of Denton: Facilitated a process with the Mayor, City Council, City Manager and executive team to review City of Denton's progress on identified priorities for FY2019, establish and affirm Council priorities for FY2020, and define a set of guidelines and practices to improve effectiveness, efficiency and sustainability of Council meetings and Council-staff interactions. Results of public meeting included: Council/staff consensus for several FY2020 initiatives within seven strategic outcome areas; two new processes for Council information requests of staff, Council Work Session item selection.</p> <p>Houston Super Bowl Host Committee: As Chief of Staff/COO, responsible for all aspects of Super Bowl LI Host Committee planning, operations, and negotiations. Managed \$64 million program budget; 39 full-time staff; 10,000 volunteers. Guided executive performance for finance, communications, event operations, and community affairs functions. Primary interface to 13+ public service agencies; identified and mitigated more than \$17 Million in rightsholder risk. Led Host Committee's State of Texas Major Events Reimbursement Program participation, which offset \$25.4 Million in local fundraising requirements.</p> <p>City of Houston, Office of the Mayor: Managed final term for Mayor Annise Parker; \$5.1 Billion annual budget and 23,000 employees across 24 departments; built cross-functional teams to execute aggressive policy and crisis response portfolio. Developed and implemented cost control plan to maintain service levels during budget shortfall; assembled core guiding team to facilitate Director-level peer buy-in. Saved \$50 Million in FY15. Led City's response to 2015 Memorial Day and Hurricane Patricia flood crises; managed preparedness, interagency coordination, and responses to Ebola epidemic scare; Executive-in-Charge during emergency evacuation of two apartment complexes and relocation of impacted families.</p> <p>City of Houston, Administration & Regulatory Affairs: Led the policy, operations, media, and stakeholder engagement for department of 598 employees, 15 organizations and \$240 Million non-tax revenue. Redesigned animal shelter operating model and KPI structure, including public sharing of performance data; post-implementation metric improvements included: 200% live release rate, 50% service call completion rate, launched 3 new business lines. Led campaign to design and promote 311 mobile application as part of redesign of 311 from Helpline to multi-channel platform. Led numerous teams through contentious ordinance revision processes to broaden services available to Houstonians.</p> <p>Leading Industrial Equipment Distributor: Company sought to restructure its operating model to gain a single view of the customers' needs and deliver services at lower cost to serve. Chris led the inside sales capability development, interviewing more than 30 customers in 6 cities to inform solution design. He also assessed job role descriptions for future state readiness; composed job descriptions for 17 new positions and recruited for the same. He mapped new customer engagement processes from "customer-first" view then led the design and adoption of 12 new customer personas.</p> |

|  | JILLIAN SOLOMON PMO CONSULTANT <p>As a member of Accenture's Mobility practice, Jillian has worked with Public Transit Agencies in the US and internationally. Her primary focus has been helping agencies to assess and improve their asset management strategies in order to maximize agency funds. In addition to advising transit agencies, Jillian is an Innovation Lead Designer for Accenture's San Francisco Innovation Hub where she develops deep understandings of her client's business challenges and then brings the best in-class teams and SMEs together to co-create solutions using a human-centered approach.</p> |
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| <p>Accenture Tenure: 2 years</p> <p>Total Experience: 2 years</p> <p>Education: B.S. Information Science—Cornell University</p> <p>Functional Experience:</p> <ul style="list-style-type: none"> • Project Management • Enterprise Asset Management • Stakeholder Management • Data Analytics | <p>Accenture San Francisco Innovation Hub: Client Innovation Lead for Consumer Products and Services Industry Group in the West. Co-creates solutions to client business challenges using a human centered approach and Design Thinking facilitation. Brings together Accenture's innovation architecture of best-in-class SME's, start-up partners, designers, researchers, technologists, and data analysts to respond to client challenges.</p> <p>Valley Metro Rail Business Assessment: Lead analyst for business assessment of regional transit authority. Conducted 13 client interviews and reviewed processes from five business units to assess agency's ability to deliver capital projects and effectively manage assets.</p> <p>New Zealand Transport Authority: Researched international agencies' strategies to modernize drivers licensing and vehicle registries. Connected with industry thought leaders to better understand opportunities for innovation and address common pain points and challenges of digital innovation.</p> <p>Bay Area Rapid Transit: Project manager for revamped budget process which improved throughput of highest risk/highest priority projects in \$917M operating budget. Oversaw progress of asset management action items. Conducted workshops with engineering staff to develop a data dictionary to ensure consistency when recording asset information. Ensured timely delivery of FTA required Transit Asset Management plan, escalating risks and issues as necessary. Managed delivery of all IT PMO maturity tasks, ensuring adherence to timelines. Analyzed gaps between current and future state of IT PMO and closed gaps by improving training, tools, templates, and portfolio strategy.</p> |

|  | <div> SCOTT BOONE SERVICE ANALYSIS TASK LEAD </div> <p>Mr. Boone focuses on scenario planning (including public transit, autonomous/connected/shared mobility, and active transportation), first-mile/last-mile access plans, travel demand modeling, transit operations, transit finance, corridor studies, travel demand management, market and transit ridership analysis, and the development of interactive data visualizations and maps.</p> |
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| <p>Cambridge Tenure: 5 years</p> <p>Total Experience: 11 years</p> <p>Education: M.S., Community Planning — Auburn University B.S., Environmental Design—Auburn University</p> <p>Functional Experience:</p> <ul style="list-style-type: none"> • Data-driven market analysis • Transit and Shared Mobility • Corridor and regional development • Pedestrian and bicycle planning • Travel demand management | <p>CAMPO Regional Transit Study. As Project Manager, Mr. Boone assisted the Capital Area MPO in the development of a regional coordinating transit document, working with both Capital Metro and the Capital Area Rural Transportation System to identify key transit projects and plans.</p> <p>VIA Long Range Plan. Mr. Boone worked as a key staff member on the VIA 2040 Long Range Plan in San Antonio, TX. In this role, he was responsible for creating maps, visualizations, and technical memos to develop a guiding document for both fixed- and nonfixed-route public transit in the San Antonio region. He worked closely with modeling staff to provide useful statistics to support project prioritization and implementation.</p> <p>VIA Comprehensive Operations Analysis. Mr. Boone conducted extensive research on non-fixed route public transit in the San Antonio region, including both feasibility and cost-benefit analysis for ride-hailing, carshare, flex-route, and micro transit operations. Operational and financial parameters for agency-ride-hailing partnerships were proposed, along with spatial and temporal limitations on service to maximize return for agency investment.</p> <p>VIA Rapid Transit Corridor Planning. Mr. Boone is assisting with the alternatives analysis for four major corridors in the City of San Antonio. He is responsible for conducting market research, analyzing and managing data, identifying and developing performance metrics, and assisting with public involvement and stakeholder engagement efforts. Focus areas include station locations, pedestrian and bicycle availability, environmental barriers, and traffic safety.</p> <p>Capital Metro Mobility Innovation Zones Analysis. Mr. Boone is leading the effort to identify effective, right-sized transit strategies for areas in greater Austin, TX not well-served by traditional, fixed-route transit. The project will utilize both traditional and innovative Big Data resources to characterize and optimize transportation choices across the region.</p> <p>DART Alternatives Analysis. As deputy project manager, Mr. Boone helped use data from regional planning models to rate and rank several light and commuter rail network expansions in the Dallas region. He also developed several new maps and data visualization projects to assist the agency in public communications.</p> <p>City of Mesquite/DART Transit Service Plan. Mr. Boone reviewed market data and transit operational and fiscal performance to provide recommendations to the City of Mesquite for medium- and long-term transit strategies. The final product included route and station locations maximizing return on investment through access and ridership.</p> <p>Arlington Transit Analysis. Mr. Boone reviewed the current and projected transit potential for the City of Arlington, TX. He researched innovative transit and shared mobility programs and implementation in mid-sized cities, conducted a review of funding models, and provided recommendations on funding strategies to implement a long-range transit vision.</p> <p>PAG Comprehensive Operations Analysis. For the Pima Association of Governments (PAG), Mr. Boone is serving as a Technical Lead to help identify market opportunities for shared mobility, high-capacity transit, and operational improvements in the Tucson, Arizona region.</p> |

|  | PATRICK BRACKEN GOVERNANCE ANALYSIS TASK LEAD <p>Mr. Bracken has worked with numerous transportation entities on compensation and job classification projects over the past 15 years. He has a deep understanding of the job functions and operational design of transportation agencies and is familiar with all of the commonly used compensation structures in this industry. Additionally, Mr. Bracken is active with public sector human resources professional associations and has been invited to speak on various compensation topics at conferences.</p> |
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| <p>Segal Tenure: 16 years</p> <p>Total Experience: 20 years</p> <p>Education: B.S., Industrial and Labor Relations—Cornell University M.S., Economics—American University</p> <p>Functional Experience:</p> <ul style="list-style-type: none"> • Compensation • Classification • Economic Analysis | <p>Jacksonville Transportation Authority. Conducted total compensation study of local and regional labor market. Re-designed pay structure and slotted all JTA job titles.</p> <p>Metro St. Louis. Conducted compensation salary survey and developed performance management program for executive leadership.</p> <p>San Mateo County Transit District. Distributed and reviewed job analysis questionnaires for all non-union staff. Developed revised job classification architecture and updated all job descriptions. Conducted total compensation market survey and developed revised pay structure for the client.</p> <p>Milwaukee County Transportation Authority. Conducted job classification analysis on all non-union job titles and revised MCTA job descriptions. Conducted performance management system review and conducted total compensation market survey.</p> <p>Washington Metropolitan Area Transit Authority. Supported labor negotiations by conducting total compensation survey of the Washington Metropolitan Statistical Area. Developed and testified before arbitration panel on cost per productive hour labor costing model.</p> <p>Mr. Bracken was previously employed by The Labor Bureau, Inc. an economics-consulting firm, where he conducted financial analysis and economic research in support of transportation unions' negotiations and interest arbitrations. He is a member of the International Personnel Management Association—Human Resources (IPMA-HR) and holds the Certified Compensation Professional (CCP) credential.</p> |

|  | <div> <div>ROWAN MIRANDA</div> <div>FINANCIAL ANALYSIS TASK LEAD</div> </div> <p>Mr. Miranda brings over 25 years of experience working on issues related to public financial management, strategic cost reduction, and organizational restructuring. He has held Budget Director and CFO roles in municipal government and most recently served as CFO/VP of Operations at the University of Chicago. Rowan brings extensive transportation experience having consulted for the NY MTA, Chicago Transit, Portland TriMet, SEPTA and Amtrak. He holds a Ph.D. in public policy analysis and has published on a broad range of topics including public budgeting, finance transformation, privatization, and ERP systems.</p> |
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| <p>Accenture Tenure: 10 years</p> <p>Total Experience: 25 years</p> <p>Education: Ph.D. & M.A., Public Policy (Public Finance Concentration), University of Chicago B.Sc. Accounting, University of Illinois</p> <p>Functional Experience:</p> <ul style="list-style-type: none"> • Strategic Cost Reduction • Public Budgeting & Accounting • Organizational Restructuring | <p>Amtrak—CFO Capital Budgeting Workshop: Supported the Accenture team with a workshop for Amtrak’s new CFO to improve capital planning and execution processes.</p> <p>U.S. Department of Agriculture-FPAC Business Center: Work focused on helping establish the Farm Preservation and Conservation (FPAC) Business Center (FBC) that supported three large USDA agencies with \$25B+ operating budget. Overall scope involved consolidating 15+ administrative functions that would ultimately be transitioned to a new operating model.</p> <p>New York Metropolitan Transportation Authority—Backoffice Restructuring: Led Accenture’s team with a multi-year project related to planning and design of a Business Service Center (BSC) for Finance, HR, and Procurement, and IT. Engagement include business process reengineering, operating model development, service management processes, capacity/workload analysis and enabling technology assessment.</p> <p>State of Ohio—Operations Restructuring: Developed a current state assessment, future state operating model, business process analysis, benchmarking analysis for Finance, Procurement HR, and IT. Engagement included workload and capacity modelling, governance structure design, contact center, service catalog, and performance management.</p> <p>Southeastern Pennsylvania Transportation Authority (SEPTA)—ERP Systems Strategy & Selection: Engaged by SEPTA to develop a strategy to replace its financial and HR systems, including software and services selection.</p> <p>Chicago Transit Authority—Administrative Systems Strategy & Selection: Developed a strategy to modernize CTA’s administrative systems (Finance, HR, Procurement, Payroll, Asset Management, Timekeeping). Supported CTA with the selection of a new ERP system including software and services negotiations.</p> <p>U.S. General Services Administration—Finance Transformation: Work included developing a strategy for GSA CFO for operations, business processes, technology, and human capital. Project also included evaluating the operational efficiency and effectiveness of transaction processing centers in Fort Worth, TX and Kansas City, KS. Deliverables included business case development, process and policy analysis, benchmarking against private industry, and implementation roadmap development.</p> |

|  | RYAN CALLISON TECHNOLOGY ANALYSIS TASK LEAD <p>Mr. Callison brings over 15 years of experience in management and technology consulting, digital & IT strategy development, sourcing, Independent Verification and Validation (IV&V) services, Business Process Improvement (BPI), and infrastructure consulting services. Prior to Accenture, Ryan worked with Gartner in the State & Local Government and Federal/Military consulting practices. Ryan has a passion for establishing trusted advisor relationships with senior client leaders that are leveraging technology and digital capabilities to transform how they operate and deliver services.</p> |
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| <p>Accenture Tenure: 1 years</p> <p>Total Experience: 16 years</p> <p>Education: BS, Management Information Systems— University of Oklahoma</p> <p>Functional Experience:</p> <ul style="list-style-type: none"> • IT Strategy • IT Service Management • Business Process Improvement • Smart Cities • IT Assessments | <p>United States Marine Corps: Developed a transformative future state and implementation roadmap for the client’s global IT governance, IT operations, and IT support services. Defined the future state by assessing the client’s IT governance, IT services, and operations, leveraging benchmarking and analytics capabilities.</p> <p>Austin Community College: Managed an initiative to develop an IT strategy for a Texas college, including an IT budget benchmark, an IT security assessment, a target state IT organization and governance model, an application modernization strategy and a solicitation for an ERP solution for finance, human resources, and student information services.</p> <p>Texas Department of Public Safety and Texas Workforce Commission: Developed IT strategic plans based on an evaluation of the current state, desired to-be attributes, and workshops with stakeholders to align priorities.</p> <p>Texas Department of Transportation: Performed executive coaching for the Senior Director of the IT Customer Relations Office. The role included providing strategic guidance related to the Service Desk, ITIL process improvement (incident, knowledge, problem, configuration, asset, business relationship management, service catalog, and service level management), desktop support, business relationship management, organizational change management, and sourcing.</p> <p>Other Clients: For multiple telecom and financial service companies, provided recommendations for improving ITIL processes, tools, service levels and IT organization design. For multiple clients in the Financial, Healthcare, and Defense Sectors — Analyzed optimization, resource consolidation, and virtualization opportunities. Engagements typically consisted of financial and technical analysis and recommendations, along with a comprehensive initiative roadmap.</p> |

Subject Matter Advisor (SMA) Panel

Our SMAs bring deep experience in transportation, public service, change management and organizational transformation, and other operational domains relevant to DCTA’s needs. These highly specialized advisors will support the internal team during the Assess Phase and are available to play a more active role in any implementation work subsequent to this phase. They comprise a small portion of the work effort in the assess phase—which allows us to keep project costs reasonable, but access point expertise given the breadth of the assessment effort. A brief description of each person’s experience is included below with full resumes available on request.



Sidney Edmonds—Service SMA (Mobility)

Mr. Edmonds serves as the account lead in Accenture’s Mobility practice and has experience leading projects that have involved a variety of domestic and international infrastructure, construction, engineering, transit, transportation, and rail projects including MTA, BART, MBTA, CNR, LA MetroLink, WMATA, and Gulf Coast Freight Rail District. His experience includes development and design of alternatives for various types of infrastructure projects, generation of cost estimates and construction management services for both

public agencies and private entities. Prior to his work with Accenture, Sid served as a project manager and a project engineer for multiple projects with the Harris County Flood Control District, Harris County Toll Road Authority, Harris County Public Works Department, and Port of Houston Authority. Sid holds a M.B.A. from The University of Houston, a B.S. in Civil Engineering from The University of Texas at Austin, is a Licensed Professional Engineer (PE) and a Leadership in Energy and Environmental Design (LEED) Accredited Professional.



John Gobis—Service SMA (General)

Mr. Gobis has served as a staff member to one of the largest transit agencies in North America, Dallas' DART, and has provided consulting support to some of the largest transportation agencies in North America, including the Toronto Transit Commission, Boston's MBTA, and New Jersey Transit. With decades of experience working in large urban areas, John has advised on multimodal services for commuter rail, light rail, heavy rail, commuter bus, local bus, paratransit and on-demand services. Additionally, he has deployed several advanced fare payment systems in Houston, Denver, Los Angeles, and Toronto. Similar to DCTA's challenge around managing increasing congestion within the area, John provided Los Angeles—perhaps the most severe traffic congestion in the country—with consulting support to expand the transit service program from one route to more than 50 routes, including a regional bus system and multiple neighborhood circulators.



Herb Higginbotham—Governance SMA

Mr. Higginbotham brings over 20 years of professional experience and thought leadership in transportation service and operations planning, capital projects, asset management, market analysis, fare management, and technology innovation with such transportation clients as: Denver Regional Transportation District, San Francisco Bay Area Rapid Transit District, Atlanta-Region Transit Link Authority, Sound Transit, and Metropolitan Transportation Commission. As an experienced and transformational leader, he works at the forefront of helping agencies prepare for the future of transportation, changes in public transit, and the evolution of smart mobility. He works frequently with transit executives and boards on topics related to organizational governance, change management, and new mobility solutions.



Jennifer Holmes—Change Management SMA

Ms. Holmes is an Austin-based Executive with Accenture's Public Service Consulting practice. She has more than 21 years of professional experience, spending the last 14 years working with Public Service clients developing strategic roadmaps, executing implementation plans, and leading and executing change management strategies including large-scale, transformational projects. She has extensive account management and project management experience over the last eight years engaging with senior-level leadership and providing customer relations and issue resolution for large scale, complex programs. Jennifer supported the Austin Mayor, City Council, City Manager, and executive team to create the City's first strategic plan in 20 years, including the development of resident-centered outcomes with accompanying metrics and strategies. She facilitated numerous cross-department working sessions. She is a certified Project Management Professional (PMP) who focuses on achieving business outcomes for the Texas government, higher education, and non-profit organizations.



Jesse Lund—Capital Infrastructure SMA

Mr. Lund draws on his 14 years of domestic and international experience helping clients improve their capital infrastructure programs across the asset lifecycle. Within transportation, Mr. Lund has analyzed high-speed rail loan applications to evaluate potential schedule delays and cost overruns, identifying risk factors and associated mitigation options. He recently concluded a research engagement to capture scheduling and risk management leading practices across state DOTs through a document review, nationwide

survey, phone interviews, and site visits. FHWA hosted an online webinar of the results and is in process of publishing the Technical Brief. He also assessed 3,600 km for a Middle Eastern country's roads program to guide the development of a long-term O&M plan with potential revenue generation schemes. Jesse holds a M.B.A. from Auburn University, a B.S. in Civil Engineering from the University of Virginia and holds both the Planning and Scheduling Professional (PSP) certification and Certified Cost Professional (CCP) through AACE International.



Jesse Samberg—Operating Model SMA

Mr. Samberg brings 30 years of experience at the New York Metropolitan Transportation Authority (MTA) with understanding of the operations, management, and workforce. He developed models for forecasting operating expenses (annual budget over \$17 billion) and provided feedback to MTA Operating agencies for negotiating changes to budgets. He also created a new shared service center to process administrative functions resulting in savings of \$25 million annually and implemented an agency-wide ERP for financial, HR, customer service, and document management platform. As a leader within MTA, Jesse motivated others to “get things done” by helping navigate complex organizations. During his tenure at the MTA, he implemented the most comprehensive shared services including project management, transformation, and change management. He is a strategic thinker and planner who sees the long-term in a changing economic environment as well as a technology expert who implements large-scale and innovative systems.

Note: If these individuals are not available at the time the project is scheduled to begin, we would provide personnel with comparable skills and experience.

3.0 Experience

Provide a list of the firm's experience with like services to other similar clients, including those located within Texas. Describe the size and the type of project, scope of work, original budget and length of time to complete at least three (3) previous projects. List dates of service, email addresses and current phone number of clients' representative(s) that can attest to the quality of services received.

Overview

Accenture will apply its deep experience in public sector transformation and transit agency service delivery innovation to DCTA's unique circumstances and goals for this engagement. Our experience and way of working are built on three important experience pillars:

Leader in Innovation. Accenture is always looking ahead to anticipate what's next and fostering a proactive culture. Accenture's Innovation Architecture uses an innovation-led approach to help our clients develop and deliver transformative solutions, and to scale them faster and more effectively (Figure 7).



Figure 7: Accenture's Innovation Architecture

Industry-leading knowledge and experience in Process Optimization. Accenture is a global leader in business process redesign, with thought leadership documented in eight books and project experience demonstrated through 20+ years of delivering successful, large-scale business process transformation at leading organizations. We have helped several hundred clients execute modernization initiatives in both private and public sectors and have trained nearly 100,000 people in Lean Six Sigma, Business Process Management, and Lean Transformation concepts.

Industry-leading knowledge and experience in new, streamlined operating models. For more than 30 years, Accenture has been a leading implementer of new operating models, a reliable way to improve service and drive down costs. Since then, Accenture has implemented more than 1,500 integrated operating model solutions for clients of different sizes. As shown in Figure 8, Accenture has helped prominent commercial clients such as Marriott, Facebook, Nestlé, and Kellogg's, as well as public sector agencies such as the New York MTA, the State of Ohio and the U.S. Department of Agriculture (USDA) improve administrative operations--including consolidating duplicative work and improving overall service levels.

Through these experiences, we bring the "client point of view," which helps focus the recommendations and solutions we propose for the DCTA Agency Transformation Initiative in actionable, relevant terms.


































































Figure 8: Operating Model Transformation Clients (Illustrative)

We have assembled a team of partners—Cambridge Systematics and Segal -- who bring their own deep experience guiding equitable organizational strategies, developing new processes and organization structures and managing projects to achieve results that create meaningful outcomes for government organizations. Furthermore, our collective capabilities span the entire transformation lifecycle, from setting the vision, assessing the gaps, developing the plan and strategy to managing performance and change through effective implementation.


We completed projects for other clients that faced similar challenges to DCTA such as Amtrak, MBTA in Boston, BART in San Francisco, Exxon Mobil, and the Gauteng Department of Infrastructure Development (South Africa). Many of our clients operate with large capital budgets in asset intensive industries such as Public Works and Transportation, Mining, Oil and Gas, and Utilities. Although DCTA is a public agency, we believe that commercial best practices will resonate. We helped clients improve productivity and reduce costs on the end-to-end Asset Lifecycle, including: Capital Planning, Funds Management, Budgeting, Engineering, Construction, Operations, Maintenance through to disposal, including the supporting services. These are similar to many of the DCTA operational functions; there's much to be learned from our successes in driving out costs for other clients.

We look forward to serving as DCTA's trusted partner and have selected experiences that best demonstrate our team's ability to perform the work as described, highlighting the impacts of projects with clients comparable in size, scope, or nature to DCTA's Transformation Initiative. The following table provides a summary of our extensive experience providing transit-related services and enterprise transformations across our global network.

Listed below are our combined team experiences in the public sector and transportation space executing similar projects. Note: Experiences in bold text are described in more detail below.





| Representative Experiences |  Service |  Governance |  Financial |  Technology |
|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| City of Austin, TX—Strategic Plan | |  |  |  |
| Travis County, TX—Strategic Plan | |  |  |  |
| Fulton County, TX—Strategic Plan | |  |  |  |
| TXDOT—Multiple Engagements |  |  |  |  |
| DCTA (TX)—Classification & Compensation Assessment | |  |  | |
| HCTRA (TX)—Classification & Compensation Assessment | |  |  | |
| VIA Metropolitan Transit—General Planning Contracts |  |  |  | |
| VIA Metropolitan Transits—Vision 2040 Long Range Plan & Comprehensive Operations Analysis |  |  | | |
| Capital Metro—Mobility Innovation Zones |  | | |  |
| DART—2045 Transit System Plan |  |  |  | |
| Fairfax County, VA—Community-Driven Strategic Plan |  |  |  |  |
| Sound Transit—Innovation & Technology Review |  |  | |  |
| MBTA—Capital Project & Investment Transformation | |  |  |  |
| MTA—Business Service Center/EAM Implementation | |  |  |  |
| Valley Metro—Capital Program Assessment & Strategy | |  |  |  |
| LA Metro—Asset Management Support Services |  |  |  |  |
| BART—Enterprise Asset Management Best Practices |  |  |  |  |
| Metrolinx Toronto—Multiple Engagements |  |  |  |  |
| Norfolk Southern— Employee Experience Vision | |  | |  |
| SNCF—Strategy and Organization of New Entity | |  |  | |

Selected Experiences

| VALLEY METRO RAIL CAPITAL PROGRAM ASSESSMENT AND STRATEGY [Accenture]  | | | |
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| Client Name: | Valley Metro Rail | Project Name: | Capability Assessment |
| Original Budget: | \$150k | Service Dates: | May—June 2019 |
| Contact Name: | Jim Hillyard | Contact Title: | Chief Administrative Officer |
| Contact Email: | jhillyard@valleymetro.org | Contact Phone: | (602) 495-8234 |
| Business Challenge & Objectives | | | |
| <p>Valley Metro is the regional public transportation agency providing transit services to residents of metro Phoenix. Services include regional bus, light rail and paratransit service to alternative commuter solutions. Valley Metro's core mission is to develop and operate a network of transit services to connect communities and enhance lives.</p> <p>Valley Metro achieved a successful launch and operation of its 20-mile light rail system in 2008, as well as a six-mile 2015-16 expansion. Looking ahead, however, Valley Metro's ambitious plans for continued growth include six additional light rail extensions to create a 66-mile system by 2034. With these ambitious growth plans Valley Metro faced the inevitable challenge of ensuring it expands the light rail operation without suffering a loss in customer satisfaction or a decrease in service quality.</p> <p>Accenture partnered with Valley Metro to conduct a high-level assessment of its Light Rail Capital Program operating model and organizational design to provide insights and recommendations on how it might prepare the organization and its processes, technologies and resources for expansion to deliver economic and efficient results.</p> | | | |
| How We Helped & Outcomes | | | |
| <p>We supported Valley Metro across three of DCTA's four focus areas—Governance, Finance, and Technology.</p> <p>Governance: We conducted a high-level assessment of the functionality and business processes of the Operations & Maintenance Center (OMC) and Capital and Service Development (CSD), considering industry standards, leading practices, and business imperatives. The client sought to identify opportunities within its organization, business processes, and select policies. As part of the analysis, we benchmarked Valley Metro's capabilities against a peer group and assessed the effect of potential improvements on plan to expand OMC for maintenance of additional light rail cars. We also co-developed a ranking system with Valley Metro using several criteria: potential quick wins, value to the Valley Metro, risks, priorities, and constraints. Our recommendations leveraged insights on Valley Metro's resources, governance, and processes that could be optimized to maximize efficiency and foster strategic innovation. We utilized Accenture's Asset Management Assessment tools to surface ways operations could best align to strategic objectives.</p> <p>Finance: We utilized Accenture Capital Project Assessment tools to provide recommendations on how Valley Metro CSD could best position itself to execute its Capital Improvement Plans and improve its Enterprise Asset Management capabilities. Part of the discovery focused on increasing the coordination of "Back-Office" support services (like Finance) and alignment with the project delivery lifecycle.</p> <p>Technology: Our assessment informed recommendations regarding ways Valley Metro could leverage technology tools to drive digital and innovative experiences to drive stronger operational outcomes. These included a strategic roadmap to replace the existing ERP system, and to enhance Asset Management cost-effectiveness through integration of Enterprise Asset Management (EAM) and Capital Project Portfolio Management tools. Part of the review looked at maturing the maintenance functions which typically leads back to technologies as topics like risk-based inspection, drones and IoT sensors, predictive maintenance, and digital twin are discussed.</p> | | | |
| Why Relevant to DCTA | | | |
| <p>Like DCTA's numerous changes over the past year, Valley Metro also experienced multiple disruptions (e.g. market, technology and political). As a result, there were modest pockets of process improvement but a holistic,</p> | | | |

transformation strategy did not exist. Furthermore, Valley Metro was also looking to expand its operations, so it was “evaluating the now” to plan for the future as it looked at capacity of its system and capabilities of its people. It will be important to take the same forward-looking view with DCTA’s operations given the regional growth and expansion plans at various stages of development (e.g. Veloweb shared-use paths, connection to DART’s Cotton Belt line, any of the proposed Regional Express Corridor plans, downtown weekend trolley service, and so on).

We also worked with Valley Metro to develop a relevant scoring methodology which increased stakeholders buy-in to the process and avoided arbitrary grades. This solution was tailored to Valley Metro and not something we fit within any existing frameworks. While the grading was custom, our Capital Project Assessment tool did help to clarify the capital planning process and help determine how best to allocate funds based on the potential projects.

| MASSACHUSETTS BAY TRANSIT AUTHORITY (MBTA) CAPITAL PROJECT & INVESTMENT TRANSFORMATION [Accenture] | | | |  |  |  |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|----------------|---------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| Client Name: | Massachusetts Bay Transit Authority (MBTA) | Project Name: | Capital Projects Management Transformation | | | | |
| Original Budget: | \$3M | Service Dates: | Nov 2017—Ongoing | | | | |
| Contact Name: | Joanna Aalto | Contact Title: | Assistant General Manager for Capital Program Oversight | | | | |
| Contact Email: | jaalto@mbta.com | Contact Phone: | (617) 222-5178 | | | | |
| Business Challenge and Objectives | | | | | | | |
| <p>Each weekday, MBTA moves 1.3M passengers across a 200 square mile public infrastructure system via heavy rail, light rail, commuter rail, buses, ferries and paratransit. Operational performance is constrained because of long neglected and aged infrastructure. Through an aggressive \$8.2B, 5 Year Capital Investment Plan, the MBTA aims to accelerate capital spending, the pace of project execution, and improvement to a “state of good repair”.</p> <p>The capacity to execute the ambitious Capital Investment Plan was constrained due to lack of visibility, siloed and redundant business functions, inefficient processes, outdated systems and limited resource capacity. Recognizing the need for improvement to their capital project management systems to enable and manage accelerated spending and project delivery, MBTA retained Accenture to help them execute a transformation initiative.</p> | | | | | | | |
| How We Helped & Outcomes | | | | | | | |
| <p>We supported MBTA across three of DCTA’s four focus areas—Governance, Finance, and Technology.</p> <p>Governance: Providing strategic support and business optimization services for MBTA, we focused on bringing in best practices and thought leadership to decrease the overall capital planning lifecycle and increase visibility to asset management functions. The team first facilitated strategic planning exercises to define clearer organizational purpose and goals. Then using this output, the team focused on organizational change management activities to improve operations, reduce redundancies and streamline decisions within the governance framework and controls. Part of this led to a reengineering of business processes to automate manual processes within an electronic workflow. Since the processes are supported by people, the team also identified opportunities to right-size the workforce roles and responsibilities in order to promote greater information sharing that ultimately led to improved management decisions.</p> <p>Finance: As part of the technology legacy management system assessment (noted below), leading financial, risk, and operational leading practices were outlined. The system implemented sought to strengthen financial controls by moving many manual processes into electronic workflow processes that increase efficiency, manage accountability, and improve transparency. The delivered solution managed and provided reporting on several pieces of capital improvement project information, including, but not limited to; budget, cost, schedule, spend, and</p> | | | | | | | |

forecast. As a result, these automated functions greatly improved the financial traceability and auditability of project planning and management decisions. We also performed an extensive BPR project on their ERP systems.

Technology: We started with an analysis of legacy management systems to determine gaps and needs across the primary users. This assessment resulted in a documentation of existing systems and processes, outlining industry leading financial, risk, and operational leading practices, and implementation of recommended improvements for future state. After which, we implemented a Project Management Information System (PMIS) for project budget, funding, contract and expenditure management. Integration of this new system was based on principles that significantly improved information sharing and facilitation, standardized data capture, documentation, and reporting. Part of this effort also included an enterprise scheduling analysis tool and integration prototype for the PMIS and ERP (PeopleSoft) systems.

Additionally, the team created an enterprise-wide information and data management repository to clean-up, normalize, and convert data as well as develop intuitive and repeatable management reports. The improved data structure and quality, reporting processes, KPI definitions and dashboard designs improved and accelerated decision making and transparency.

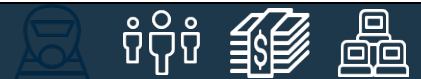
Why It's Relevant to DCTA

Many of the activities performed and listed above resonate with DCTA's FY20 Strategic Goals for example:

- Leverage available industry technology to enhance the customer service and data collection processes
- Provide accurate and reliable revenue and expenditure forecast and maintain budget practices that ensure sustainability and continuity of programs and services

DCTA recognizes the relationship between **Governance**, **Finance**, and **Technology** when evaluating internal operations. A balance must exist when attracting and retaining the right talent, empowering the workforce through training and enabling technologies, and providing the framework—without the restriction—of a structure that support individuals ability to do their jobs and make the right decisions for the organization. Ultimately, the balance of these internal functions can have a direct correlation with operational (e.g., **Service**) performance.

METROPOLITAN TRANSPORTATION AUTHORITY (MTA) BUSINESS SERVICE CENTER (BSC) TRANSFORMATION [Accenture]



| | | | |
|------------------|---------------------------------------------|----------------|----------------------------------------------------------------------------------|
| Client: | Metropolitan Transportation Authority (MTA) | Project: | Business Service Center (BSC) Transformation & Enterprise Asset Management (EAM) |
| Original Budget: | \$120M | Service Dates: | BSC: Mar 2009—Mar 2013; EAM: Project On-Going |
| Contact Name: | Wael Hibri | Contact Title: | Deputy Chief Transformation Officer |
| Contact Email: | wahibri@mtahq.org | Contact Phone: | (212) 878-7115 |

Business Challenge and Objectives

The Metropolitan Transportation Authority (MTA), North America's largest transportation network, consisted of eight agencies, each of which maintained its own human resources (HR) and finance systems and administrative staff. The MTA is made up of numerous divisions located throughout the NYC area and carries out planning and other responsibilities both directly and through its subsidiaries and affiliates (e.g., Long Island Railroad, Bridges & Tunnels, NYC Transit) and oversees subordinate agencies. Its numerous agencies differ in size, complexity, operating characteristics, and geography. The MTA employs 74,000 people and had an annual operating budget in 2019 of \$17 billion. It includes 736 rail and subway stations and nearly 3,000 bus route miles.

MTA sought to reduce fragmentation of its backoffice functions and gain economies of scale as well as improve service through a consolidation strategy. Objectives of this transformation project included the following:

- Design, implement, and launch a Business Service Center (BSC) based on a shared services model to support finance, HR, procurement and IT functions
- Implement a single ERP system—consolidating the multiple agency specific systems
- Streamline business processes, including expanding use of automation, workflow, and self-service
- Reduce operating expenses and improve consistency across the various MTA agencies
- Establish a high-performance enterprise Shared Service Center that combines the efficiencies of centralization with excellent customer service delivery
- Implement an enterprise portal to support all HR and financial functions across external and internal applicants, vendors, self-service employees, retirees, and core users.

How We Helped & Outcomes

We supported MTA across three of DCTA's four focus areas—**Governance, Finance, and Technology**.

Governance: We worked with the MTA to reengineer its finance, HR, and procurement business processes. Through the business process design, we identified opportunities for improvement and implemented more efficient processes supported by automated approvals and self-service technologies. In designing the “to-be” organization, we provided capacity assessment, organizational design, roles and responsibilities definition, training, procedures, and job aid development to support knowledge transition plans. There is a strong governance body that reviews performance and recommends new opportunities.

Finance: We worked with the MTA to create a shared services organization, supported by a robust service management framework, as well as establish the procedures and support tools for a call center and portal. This resulted in efficiencies through the consolidation of technologies across the organization and reduced labor savings of 30% across HR and Finance functions.

Most importantly, we phased in services corresponding to the major functions (e.g., Financial Management, Purchasing, Inventory, and Human Resources/ Payroll) without disruption to MTA services. We worked with the MTA to gather and implement eligibility rules and standard processes to provide benefits for more than 74,000 active employees and more than 50,000 retirees. Ongoing cost savings is a part of a continuous improvement culture.

Technology: We completed an enterprise-wide assessment, selection, design, and implementation to support all HR and Finance functions across external and internal applicants, vendors, self-service employees, retirees, and core users. We then implemented an integrated PeopleSoft Financial and HR systems, providing a comprehensive approach for implementing a Business Service Center (BSC) and a consolidated PeopleSoft ERP system for financial and HR management. This represented a consolidation of PeopleSoft technologies onto a single instance. By consolidating these functions into a BSC and centralized ERP system, the MTA reduced its operating costs, increased efficiency, and retired dozens of legacy application systems.

Why It's Relevant to DCTA

DCTA already entered into a reciprocal fare agreement with Trinity Metro and continues to look for interlocal agreement opportunities to reduce operating expenses (e.g., **Finance**) while maintaining performance standards (e.g., **Service**). As DCTA looks to expand its service, particularly with the planned Regional Express Corridors, there likely exists further opportunities to identify possible shared services to manage and minimize costs, including sharing technology and potentially business operations.

Similarly, there exists an opportunity to explore shared services options with the recently established North Texas Mobility Corporation (NTMC) that could support organizational functions (e.g., **Governance**) of both entities.

VIA METROPOLITAN TRANSIT (VIA) GENERAL PLANNING CONTRACTS [Cambridge Systematics]



| | | | |
|------------------|----------------------------------------------------------------------------|----------------|-------------------------------|
| Client: | VIA Metropolitan Transit (VIA) | Project: | General Planning Contracts |
| Original Budget: | \$5M | Service Dates: | 2014—Ongoing |
| Contact Name: | Art Herrera | Contact Title: | Manager of Strategic Planning |
| Contact Email: | arturo.herrera@viainfo.net | Contact Phone: | (210) 299-5800 |

Business Challenge and Objectives

VIA Metropolitan Transit provides regional multimodal transportation options including bus service, paratransit service, vanpool service, special event park & ride service, and VIA Primo bus rapid transit over 1,000+ square miles serving San Antonio and its surrounding municipalities. With over 36 million passenger trips and nearly 100 routes—VIA aims to connect its communities to opportunity and enhance the quality of life throughout the region.

Every five years, VIA updates its Long-Range Comprehensive Transportation Plan (LRCTP) to realign and prioritize its transit investments to coincide with other regional projects and priorities. For VIA, Cambridge Systematics (CS) has served in the following capacities:

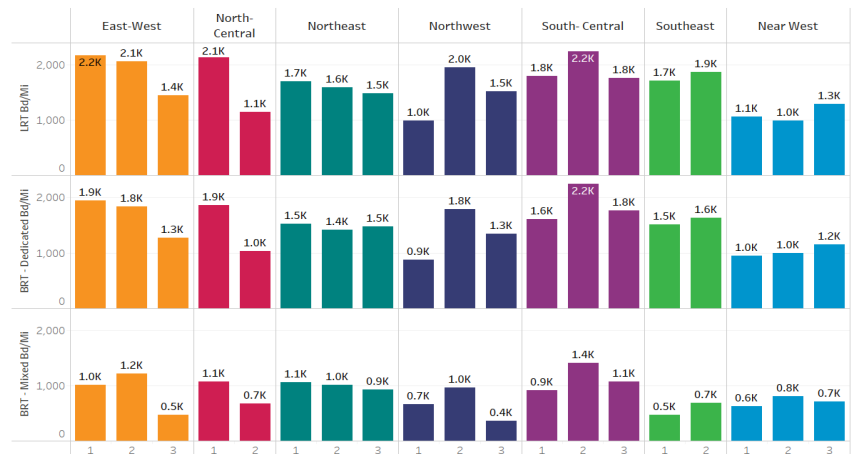
- Prime consultant on the Vision 2040 Long Range Plan;
- Prime consultant on VIA's ongoing Rapid Transit Corridor studies; and
- Key subconsultant on the Comprehensive Operations Analysis.

Deliverables included technical reports, demand and ridership modeling, public outreach materials, executive summaries and board presentations, and general transit planning.

How We Helped & Outcomes

Cambridge supported VIA across two of DCTA's four focus areas—**Service** and **Finance**.

Service: We brought both deep knowledge of metropolitan transit planning and strong technical background to bear through multiple contracts and task orders. By developing strong relationships with VIA staff and peer agencies, we have provided nuanced and insightful input into the transit planning process, developing a great deal of organizational trust in the process. Our work primarily focused on transit planning and modeling, helping to develop a comprehensive “vision network”.



Finance: We conducted extensive financial projections to support funding need calculations as well as cost-of-service projections, critical to sustain a dynamic operating model.

Why Relevant to DCTA

Each plan includes extensive analysis of the role of transportation network companies (TNCs) and similar ride-hailing services, rapid transit corridors, and fixed-route bus services as part of a comprehensive network of transportation solutions. In the context of identifying alternative solution for low-productivity transit routes, CS mapped and modeled TNC fares against the latent travel demand from the areas served by the lines, showing that

even heavily-subsidized TNC fares could be competitive against fixed-route bus service while augmenting the agency's existing transit investments. Understanding the long-term fiscal impacts of different modal technologies—from demand response to light rail—has provided VIA with the organizational to develop a cohesive and implementable long-term transit vision.

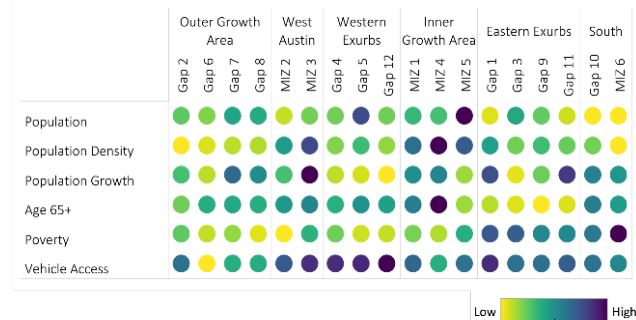
CAPITAL METRO MOBILITY INNOVATION ZONES [Cambridge Systematics]



| | | | |
|------------------|------------------------------------------------------------------------------|----------------|-------------------------------------------|
| Client: | Capital Metro | Project: | Mobility Innovation Zones |
| Original Budget: | \$140K | Service Dates: | Jan 2018—June 2018 |
| Contact Name: | Todd Hemingson | Contact Title: | VP Planning & Development [now at HDR] |
| Contact Email: | todd.hemingson@capmetro.org | Contact Phone: | (512) 369-6036 |

Business Challenge & Objectives

Cambridge Systematics performed a market and travel behavior analysis of greater Austin areas either not served or not well-served by traditional fixed-route transit. The team identified zones appropriate for a shared mobility pilot project and provided a methodology for expansion of future shared mobility projects.



The project considered different service delivery options and a detailed examination of travel behavior in the pilot area, pairing the characteristics of the mobility solutions with the travel behavior within that zone. We analyzed the travel data to parse out different behaviors that could match the most appropriate mobility solution. This toolbox has supported Capital Metro's expansion of their on-demand services around the region.

How We Helped & Outcomes

We supported Capital Metro across two of DCTA's four focus areas—**Service and Technology**.

Service: We helped to develop both demographic and travel pattern analysis to support both identification of where zone pilots would be placed, and the policy structure required to support those programs. We conducted extensive trip behavior analysis, including cell phone geolocation data and travel demand modeling; these data were synthesized with a pre/post service change analysis to determine the areas of greatest need and identify demand-response travel options to support those neighborhoods.

Technology: We also helped develop technological needs assessment to support implementation of the mobility innovation project. By identifying peer best practices around the country contextualized with Capital Metros existing partnerships, we were able to present a menu of pilot programs that represented efficient, equitable, and effective mobility options

Why Relevant to DCTA

Capital Metro's early involvement in the development of innovative mobility partnerships has given us experience with a wide range of provider models, from in-house demand response staff to TNC partnerships. Combining demand response service with a fixed-route network—whether commute, medical, first mile/last mile, or in another form—requires a nuanced understanding of the pros and cons of each service model.

4.0 Project Proposed Approach

Provide an outline of your general plan, approach and qualification to engage in a professional relationship with DCTA.

Our Understanding

DCTA has already had a year of notable and positive organizational change (legislative amendment to board composition, board structure, and executive leadership) as well as service change (permanently reducing local fares, awarding MaaS contract, completing PTC testing, and most recently transitioning the Highland Village Connect Shuttle to discounted Lyft program). DCTA has also defined a clear, citizen-focused vision outlining its commitment to improving mobility, air quality, economic development and livability in North Texas through the implementation of core values that prioritize safety, accountability, commitment, excellence, integrity and respect—allowing DCTA to advance mobility alternatives in North Texas. DCTA now seeks to capitalize on this momentum and solidify the culture of change to envision a future which addresses the evolving landscape of transit, expand into the right markets and services, and meet customer needs ultimately improving the quality of life for residents in the Denton, Highland Village, Lewisville, and other communities in its service area.

DCTA's decision to develop an Agency Transformation Plan is timely. Not only is it an opportune time to tackle an assessment of services and associated costs, changes in the ambient environment due to COVID-19 are likely to have enduring impacts (e.g., ridership levels, funding sources, citizen expectations). Transformation of public agencies is a complicated and difficult task that requires both careful planning and thoughtful implementation. Based on our experience, there are many important questions that must be answered during any successful change effort. These include, but are not limited to:

- **Strategic Intent:** How does the current organization structure align with strategic priorities of the Board? What can be done to improve that alignment? What are the most important guiding principles in designing a new structure? What is the overall vision for a future DCTA operating model?
- **Core Operations:** What are the common services that can be standardized across DCTA to reduce duplication and overlap? What are the optimal spans and layers to balance the agility needed to serve customers and achieve operational efficiency?
- **Governance and Structure:** Are there ways to reduce silos and improve collaboration across DCTA? What are the service levels, performance, and operational metrics for each service?
- **Processes and Technology:** How can we simplify processes, reduce costs, streamline cross-departmental coordination, reduce decision-cycle times, and improve citizen-service and mission readiness? How does the current organization support these objectives?
- **People and Culture:** What is the impact of the new organization structure on the workforce? How do we best leverage existing resources? What cultural changes should be addressed?

To help answer these questions, Accenture utilizes the FORM methodology (described in greater detail below and in the Timeline Section 5.0) in a holistic way to decompose the organizational structures and interdependencies. After establishing a fact base related to the current organization structure, we compare that against DCTA's strategic intent and customer service aspirations. Next, the team looks at how the services are provided for core operations—who executes the service, with what technology and processes—and from an organizational lens –strategic alignment,

governance, culture, and structure. Finally, our approach examines the use of a continuous improvement process loop to monitor performance and the capacity to evolve services. Using this approach, the team gains a holistic understanding of each potential service offering, which is then used to assess redundancies, identify opportunities for improvement, and baseline service gaps where a restructuring of organizational units may be beneficial.

In our experience transformation involves change to organizational structures, processes, people and technology all at the same time. Elements of transformation include:

- Processes reengineered based on leading industry practices
- Services designed from the user's point of view (user-centered design)
- Systems modified or modernized to enable the newly designed processes
- People with the enhanced skills, capabilities, and competencies to be productive and successful
- Organizational DNA that fosters performance rather than control—allowing the people, processes, and technology to achieve their full potential

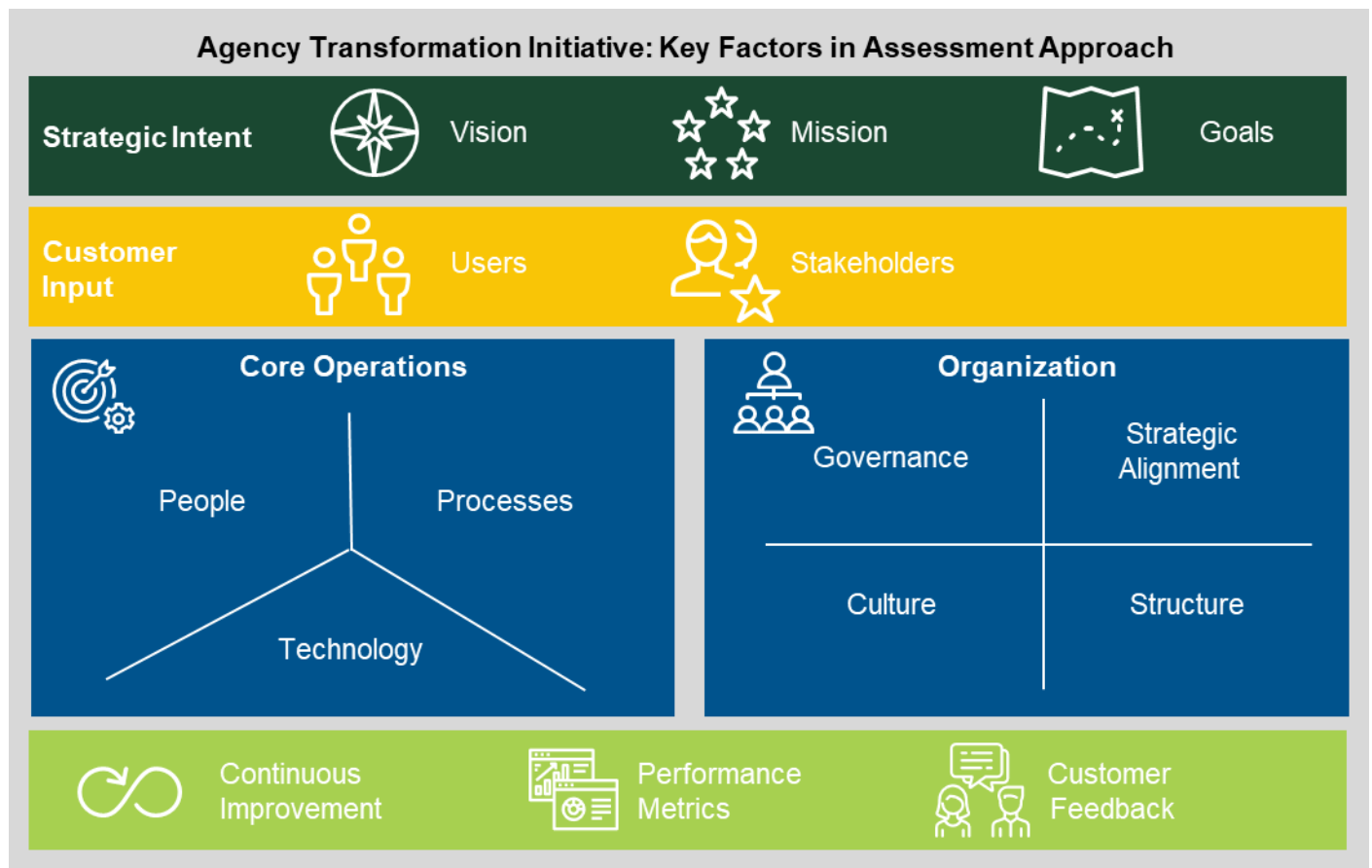


Figure 9: Accenture's Assessment of DCTA Operations Relies on a Holistic Approach

While our immediate scope is focused on assessing the four major task areas, we will examine these factors in our approach and workplan for DCTA.

Approach

Our approach is underpinned by Accenture's proprietary FORM consulting methodology. FORM is a five-phased approach that encompasses the full lifecycle of strategy development to implementation and measurement. FORM allows us to unlock trapped value, uncover opportunities for improvement, and unleash innovation. It brings a keen focus on value creation and insights driven by data, always putting the user experience at the heart. FORM puts the end users at the heart of the assessment and design activities. It means that they are instrumental to the visioning process and our experience tell us that this accelerates buy-in, increases ownership, and maximizes the commitment to change. Accenture will work closely with our DCTA counterparts to assess opportunities to enhance efficiency and effectiveness and prioritize a cohesive set of initiatives to comprise the transformation plan.

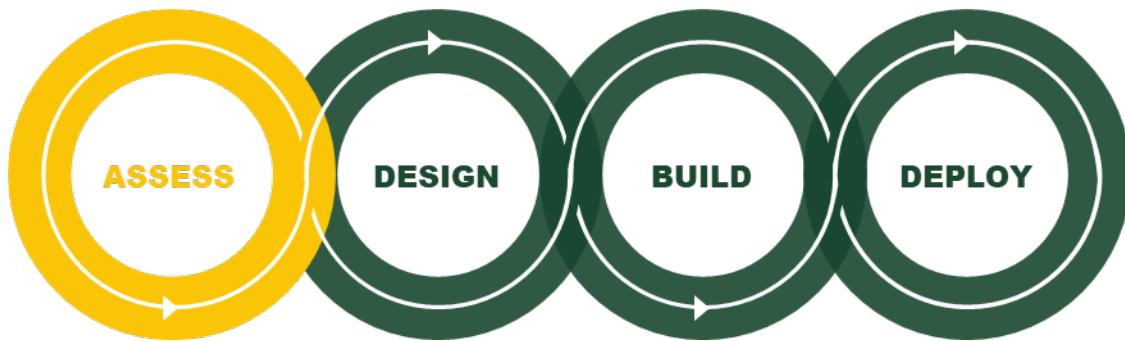


Figure 10: Accenture's Methodology for Organizational Transformation

As it pertains to this proposal, the base work encompasses the Assess phase of our methodology. The Assess phase is focused on producing the Transformation Plan and has a duration of 12 weeks. DCTA will be prepared to begin implementation immediately by moving into the Design phase.

This tested methodology is constructed to help DCTA achieve program objectives in a structured, logical fashion. It introduces new opportunities to deliver improved customer experience, economic value, and data driven insights. This methodology has been applied and refined at some of the most complex organizations in the world, with access to leading practices from the commercial sector, experienced practitioners, market-leading tools, and field-tested accelerators. The methodology is further sharpened for DCTA by our nearly three decades of experience working in the public transportation space.

As discussed earlier, Accenture has hand-selected a seasoned team with a collective understanding of public transportation and DCTA's challenges, a fresh perspective, and experience in organizational assessment, design, and implementation. This senior team has the appropriate mix of skills and cultural fit—pragmatic, open, and collaborative—to ensure the success of this initiative.

Accenture's extensive experience across complex organizations has taught us that assessing and establishing transformation plans is a collaborative journey requiring thoughtful engagement with all levels of an organization including its customers. Accenture's approach for DCTA applies lessons from our prior experience and tailors solutions based on the agency's specific needs. We have learned that organizations that pursue transformation fail to achieve their stated goals when feedback across the organization is not solicited or is ignored.

Accenture's methodology and approach are built to avoid these traps. Our approach is based on real-world experience helping our clients develop new operating models in nearly every sector of the economy and around the

world. We have incorporated these experiences into our approach for DCTA from standing up and/or running mission support functions for some of the most prominent and complex institutions in the world (e.g., Apple, Google, Microsoft, Marriott, U.S. Department of Commerce, and many state and local governments). We bring a tested methodology that contains four elements critical to success:

- (1) **Employee and Customer-Centered Design:** We are thoughtful about the impacts of transformational change on employees and customers, utilizing a process that taps into their knowledge and energy to drive change.
- (2) **Effective Change Management:** We will document considerations to increase the chances that staff embrace change and adopt a culture oriented toward efficiency and customer service.
- (3) **Data-Driven Decisions:** We leverage a fact-based, data-driven approach to crystallize issues and guide difficult decisions.
- (4) **Utilization of Leading Practice Business Process Model:** We also bring a toolkit that serves as a repository of leading practice processes and prior client experiences to accelerate the path to developing a sustainable future state operating model for DCTA.

Assessment Description by Functional Area

Category 1—Service Analysis & Recommendations



The Service Analysis Task will follow a two-phased approach designed to equip DCTA staff information to support decision making early in the process. First, the team will develop a comprehensive transit service evaluation based on existing and readily available data to provide a “snapshot” of the effectiveness of DCTA’s services. Second, the team will provide an integrated, outcome-oriented set of recommendations

linking the four focus areas: transit service, organizational structure, fiscal policy, and technology to ensure a sustainable future.

To understand existing transit service, we will identify factors reflecting both the consumer experience, for riders and nonriders alike, and the DCTA’s ability to provide service. We understand which factors make transit competitive and will identify where consumers are (or are not) presented with competitive and useful transportation options. By understanding DCTA’s vision and priorities, we can provide insights into the customer experience and the agency’s ability to deliver to lay a foundation for effective organizational change.

We will provide individual ratings—as required in the RFP—to the enumerated individual factors affecting train, bus, and mobility operations. In each case, we will use both industry-standard references (e.g. Transit Capacity and Quality of Service Manual, NACTO guides, and Federal Transit Administration guidance) and local context (e.g. City of Denton Strategic Measures, DCTA performance metrics, comparison with regional peers).

While performance ratings allow for an “apples to apples” comparison, it is critical to remember transit services are multi-dimensional and extend beyond operational efficiency. The socioeconomic impact of transit cannot be overlooked and must be incorporated into the analysis as it relates to how communities are serviced and connected within and across their boundaries. We intend to develop a rubric that grades the operational performance against these other factors, following discussion and agreement with DCTA stakeholders.

DCTA’s transit service can be understood within three broad and related focus areas. **Coverage and Network** represents the agency’s use and allocation of resources from a geographic perspective; understanding where

services are available relative to the people and businesses forms the foundation of this analysis. These factors can be examined both by base coverage (i.e. service at the origin and destination) and by trip coverage (i.e. service connecting specific origins and destinations). This represents largely internal decision-making processes.

While an agency's coverage and network represent its aspirations, **Schedule & System** represents how well the agency provides services to meet those goals in the context in which they exist. Frequency, reliability, on-time performance measure both the agency's ability to put service on the ground and predictability in doing so.

Finally, understanding the **Customer Experience** requires an understanding of how the agency interacts with the customer. Communication, perception, safety, and reliability all have a dramatic influence on who chooses to—or not to—use transit.

Each of these factors can be understood as a policy question coupled with the metrics or analysis needed to answer as seen in the table below. We plan to work closely with DCTA to access the right data and have identified potential sources to help accelerate this process in advance of project kickoff.

| Focus | Factor | Policy Question | Potential Metrics | Potential Sources |
|-------------------------------|------------------|-------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| Coverage & Network | Density | Does the system provide appropriate ("right-sized") levels of transit and mobility access across its area? | Persons, households, employees per acre/net acre | American Community Survey, NCTCOG travel demand model |
| | Inclusivity | Does the system provide an appropriate level of access to all members of the public? | Customer accessibility | American Community Survey, DCTA Schedules |
| | Service Coverage | Does the system provide an appropriate level of access to demographics of concern, including those covered by Title VI? | Demographically-weighted customer accessibility | American Community Survey, DCTA Schedules |
| | Activity | Does the system provide end-to-end service that matches up with customer travel patterns? | Key destination coverage, origin–destination pairs by trip purpose, transfer analysis | NCTCOG travel demand model |
| | Connectivity | Does the system provide convenient interfaces with neighboring transit agencies and multimodal facilities? | Co-location of transit facilities with key transit and multimodal infrastructure | Local GIS data |
| | Efficiency | Do routes avoid unnecessary deviations? Are operating and maintenance costs in line with industry standards? | Qualitative review of routes and schedules; boarding per unit service delivery, operating and maintenance cost per trip | DCTA Schedules (GTFS), DCTA performance data, National Transit Database (NTD) |
| Schedule & System | Travel Time | Does the system provide competitive travel options to other modes? | Transit–driving travel time differential | DCTA Schedules (GTFS), drive time analysis |
| | Frequency | Do services arrive frequently enough to promote ridership? | Headway analysis | DCTA Schedules (GTFS) |
| | Reliability | Does the system adhere to schedules closely enough to allow customers to travel and transfer reliably? | On-time performance, observed, headway variability, service delivery | DCTA Automatic Vehicle Location (AVL) data |

| Focus | Factor | Policy Question | Potential Metrics | Potential Sources |
|------------------------------------|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|
| Customer Experience | Walkability | Can pedestrians access the system safely and conveniently? | Coverage of population using pedestrian-accessible network analysis | ESRI pedestrian network |
| | Convenience | Does the system provide access when and where customers need it? | Customer-oriented coverage analysis, qualitative analysis of service span | DCTA Schedules (GTFS) |
| | Legibility | Can customers use the website, schedules, signage, and other agency communications effectively? | Qualitative User experience (UX) review of website, mapping, schedule, and communications materials | DCTA website and communications materials |
| | Conditions | Does stop and station infrastructure provide customers with safe and clean access to the system? | Infrastructure status and standards analysis | DCTA Infrastructure data |
| | Perception | Do customers have positive experiences using the system? Are they given adequate opportunity to provide feedback? | Qualitative review of customer satisfaction surveys, sentiment analysis of social media posts, qualitative review of customer engagement protocols | DCTA surveys and engagement protocols |
| Cross-sectional Performance | Financial | Are fare rules easily understood and competitive? | Qualitative review of fare structure | Accenture / DCTA |
| | Organization | Do operators/supervisors have the tools and information needed to function? Are roles & responsibilities replicated in other organizations? | Qualitative review of organizational structure and protocol | Accenture / DCTA |
| | Technological | Is data collected and used effectively? Can employees communicate easily? Do customers have access to planning and payment options that make their travel easier | Qualitative review of technology use | Accenture / DCTA |

In the second phase, we will provide DCTA recommendations aligned with the goal of improving mobility solutions across DCTA's service area. In many areas, this will be an exercise in "right-sizing" both service levels and modes, using both fixed-route services and innovative mobility options (as well as contracted and directly-operated service) to increase ridership and quality of customer service while balancing per-trip and per-route costs and revenues. An understanding of the relationship between service, revenue, and cost at both the agency and municipal level will help balance these factors across an extremely heterogeneous region. Our work with the Capital Area Rural Transportation Service (CARTS) helped to understand the need and potential for right-sized transit and shared mobility for areas ranging from farmland to rapidly growing ex-urban corridors.

Like many public agencies, transit is responsible for meeting the complex and varied needs of their customers while operating with limited resources. We will map the relationships and tradeoffs between each factor, empowering decision-makers to make service and organization changes to meet agency goals without unintended consequences. This will be especially important as it relates to growth and expansion opportunities such as extending north to the Texas Woman's University and the possible shuttle connection between MedPark A-train station and University of

North Texas. Our experience in Tucson, AZ helped the Pima Association of Governments (PAG) decide between a variety of service scenarios, ranging from commuter-oriented jobs access programs to infrastructure investments for economic development along urban corridors.

DCTA's wide range of services—from commuter rail, to student-oriented campus services, to on-demand partnerships with ride-hailing providers—will be assessed through the identification of peers, role models, and areas of potential innovation. We will identify areas of strength and weaknesses locally and discover proven service models from around the nation. DCTA's service trajectory provides an opportunity to develop a fully integrated, multiproduct shared mobility option that meets customer demand for versatile and flexible transit service.

With that said, in some cases specific routes or services may be recommended for reduction or elimination; cost-effective areas of expansion will be considered for underserved or growing areas—like DCTA's recent decision to transform the Highland Village Connect shuttle service to a Lyft discount service. Our experience in Austin, TX provided a nuanced evaluation of service options for areas with reduced fixed-route service, resulting in a highly successful—and recently expanded—demand-response program designed to meet the needs of neighborhoods for whom fixed-route service had proved inefficient.

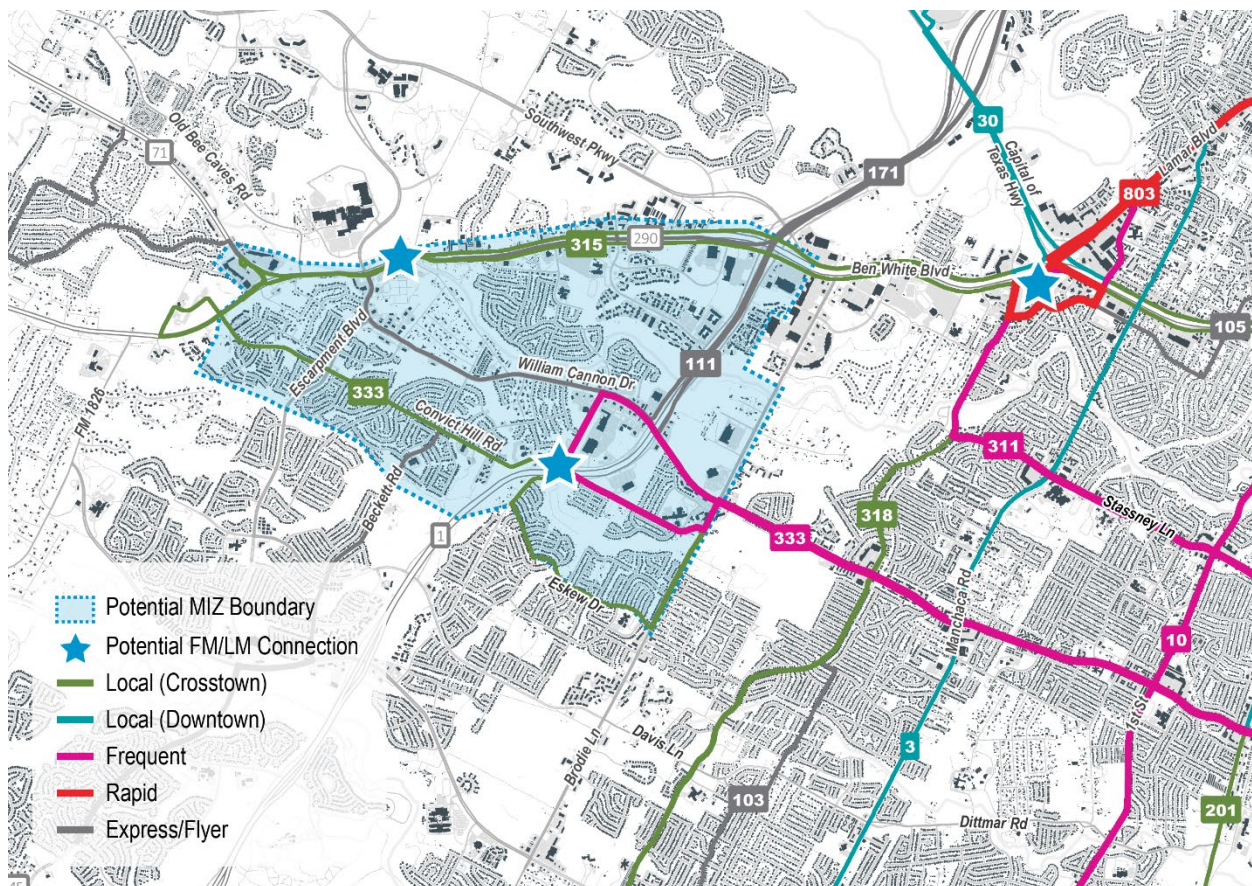


Figure 11: Mobility Innovation Zone (MIZ) Recommendations (Capital Metro)

A “menu” of transportation options and modal recommendations with information on technology, capital and operating costs, impacts of direct or contracted operation, and anticipated per-trip subsidy will form a key deliverable. The use of best-practice graphic communication and data visualization in these products ensures DCTA

will have resources to use in public meetings, stakeholder communications. In designing VIA Metropolitan Transit's Vision 2040 Long Range Plan, we provided graphics to find relevant uses long after the original plan was published.

Recommendations will be tied to performance metrics; where possible, the analysis from phase one will be used to provide historic context to concrete performance goals. Cross-cutting recommendations across the four areas of analysis (service, governance, financial and technology) will form an integrated set of next steps for implementation.

Category 2—Governance Analysis & Recommendations



Accenture will begin this area of work with a set of individual and group stakeholder interviews as specified by the DCTA team. We will organize the meetings around common topic areas and may combine some of the audiences to promote maximum engagement. The goal of the interviews is to gain qualitative insights into strengths, weaknesses, opportunities and threats as it relates to governance.

We have also engaged partner with Segal, a leading HR consultancy that provides a full range of health, retirement, and compensation services in key markets including public transportation. Segal has conducted two prior projects for Denton County Transportation Authority (DCTA) including a classification analysis and compensation assessment of DCTA's base pay and benefits offerings for all employees. Segal's most recent study was conducted in 2019 and we think that for this project we can leverage much of that prior work in this study.

Segal's prior studies with DCTA included the following tasks:

- Developed a customized total compensation market survey with 42 benchmark jobs distributed to ten (10) public sector peer employers, as well as the use of published sources to represent the private sector
- Analyzed the prevalence and cost-sharing arrangements for medical coverage, supplemental benefits, and retirement plans among the surveyed employers
- Determined DCTA's competitive market position for total compensation
- Developed pay structure and pay schedules for all jobs included in the study and recommended grade placement for all titles
- Estimated the cost of implementing the recommended pay schedules and placement of each employee within the new pay ranges
- Developed recommendations regarding the best practices and prevailing policies for pay progression, supplemental pay, and other compensation-related practices collected in the survey
- Analyzed existing job descriptions, conducted employee interviews to validate and clarify information contained in the job descriptions
- Developed recommendations for an updated classification structure, consolidated job titles and developed new class titles
- Drafted updated job descriptions for each position

We understand from DCTA's current solicitation that a review of the agency's job descriptions and compensation benchmarking study is to be performed. Given Segal's recent work in these areas, we propose the following project steps:

- Meet with key DCTA stakeholders to discuss Segal's prior compensation benchmarking analysis - review peer group (i.e. survey participants), benchmark lists (DCTA job titles), and total compensation report conclusions and recommendations

- Determine what elements of Segal’s prior work can be utilized for this engagement (Segal’s total compensation study was conducted in 2019)
- Review DCTA’s current compensation plan design and understand its operation (e.g., employee pay progression, promotion policies, pay differentials, etc.)
- Review with DCTA job classification issues/topics and determine best course of action

Finally, in addition to governance and compensation analysis related work, we would review data on staff size, organizational layers and spans of control to provide high-level analysis and recommendations as appropriate.

Category 3—Financial Analysis & Recommendations

CATEGORY 3



Financial Analysis

Accenture’s Finance & Enterprise Performance (F&EP) practice helps organizations maximize value creation for their enterprises and customers with a dedicated core of experienced consultants in financial management. We bring this combination of knowledge and experience to implement solutions that will improve the DCTA’s budgeting, cost allocation and financial management environment. Our core F&EP services as they apply to the transportation include:

- **Budget Planning, Formulation and Forecasting** that enable CFOs and budget leaders to optimize the budget formulation, execution and reporting processes.
- **Finance and Accounting Operations offerings** that support the CFO with the planning and restructuring of back-office services, helping to increase operating efficiencies, improve service and drive cost reductions. Our work in finance process improvement and robotic process automation (RPA) falls in this area.
- **Government Compliance** offerings that support end-to-end finance and budget processes, along with regulatory compliance.
- **Risk Management** offerings that protect the CFO’s investments by allowing entities to decrease portfolio risk, improve internal control risks and increase enterprise business confidence.
- **Enterprise Performance Management** offerings that refine and optimize the CFO’s ability to organize and analyze financial/cost accounting, operational and external information. Our finance analytics and dashboarding capabilities are within this area as is our work related to improving cost accounting methods for public sector agencies.

As an illustration of our work, Accenture was recently engaged by a large federal agency that was having difficulty providing transparency and traceability to adequately achieve compliance with federal cost accounting standards, meet management reporting needs, and defending the rates it charged to customers. Accenture was initially engaged to develop a new costing and rate setting framework that aligned with federal standards and regulations, and we made recommendations based on analyzing existing methodologies. We evaluated several cost allocation methods, documented advantages and disadvantages of each, and the client selected activity-based costing (ABC) as the future costing framework. We rebuilt the cost allocation model and then Accenture was asked to implement a technology tool to institutionalize the framework.

The Financial Analysis task will be organized as follows:

- (1) **Documentation of the Fact Base**—We begin with a review of the key fiscal documents of DCTA such as the operating budget, capital plan, financial plan and the Comprehensive Annual Financial Report (CAFR).

- (2) **Understand Organization of the Finance Function** - We will also examine how the DCTA's finance function is organized and identify process improvement opportunities using interviews and focus groups.
- (3) **Review of Key Processes & Policies** - We will gain an understanding of DCTA's budget process and financial policies. The core components of our work include a review of DCTA's reserve policies, the structure and content of its budget reports to management and the Board, and practices related to budgeting for assets and depreciation.
- (4) **Review the Cost Allocation Model**—We will review Cost Allocation model produced by Texas A&M, understand the methodology used (e.g., direct, step, reciprocal, ABC) and suggest modifications and/or improvements.
- (5) **Synthesize Analysis and Recommendations**—We will consolidate findings from our work and include related recommendations in the respective deliverables.

Category 4—Technology Analysis & Recommendations



Our work in the Technology Analysis task presents an opportunity to "take a step back" and rethink how technology, via both innovative and existing solutions, could better serve and bring added value to DCTA. Accenture can draw upon our leading research and technology trend analysis, our premier partner relationships with leading technology vendors, and our Design Thinking and other co-creation methodologies to guide this exercise. The output of this phase is a consolidated list of recommended opportunities outlining the areas in which IT would improve, expand, and enhance capabilities, services, and projects to achieve business imperatives.

The following are the objectives of the Technology Analysis phase:

- A consolidated list of enabling technology opportunities from an assessment of major backoffice, operational, and customer service systems and the recommendations coming out of other areas of the current state assessment. Our goal would be to leverage existing DCTA investments as much as possible, ensuring a positive business case for savings and an overall alignment with your IT Strategy
- Prioritization of the enabling technology opportunities in concert with the DCTA Steering Committee to bring the greatest value to the agency in the shortest amount of time
- 2 or 3 leading products per top enabling technology leveraging Accenture's leading research and market insights for DCTA's consideration.

Refine and Recommend Top Enabling Technology Opportunities

Our goal is to focus on the major applications used by DCTA for backoffice, operational and customer service areas. We will examine existing technologies using our Modernization Assessment Framework:

Modernization Assessment Framework

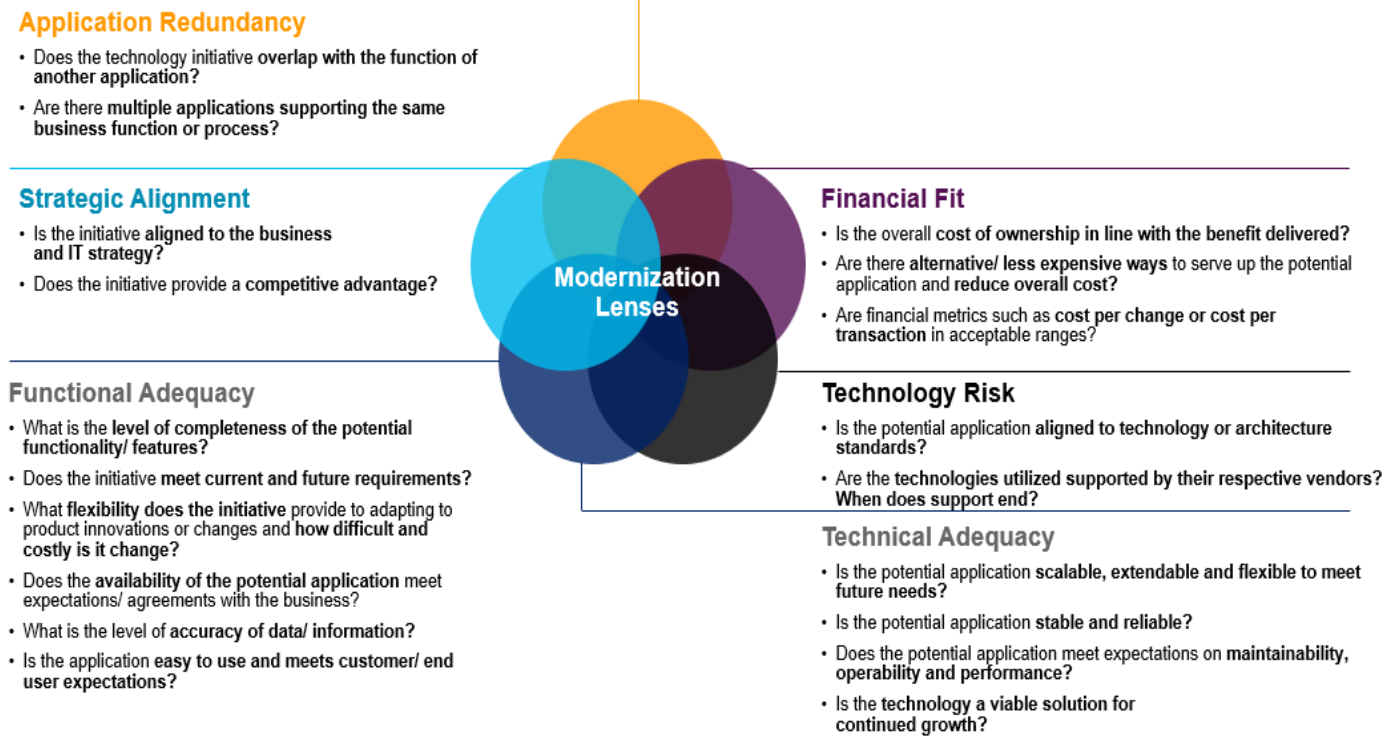


Figure 12: Modernization Assessment Framework

As an outcome, these technology initiatives will be preliminarily prioritized and categorized as Must Haves, Should Haves and Nice to Haves. This prioritization and categorization will serve as a baseline recommendation for subsequent conversations with DCTA Stakeholders and the Steering Committee where the list will be further revised and consolidated. Subsequent activities will include the following:

- Conduct workshops, such as a Technology Planning Summit with DCTA stakeholders, to refine the initiative prioritization and guiding principles
- Identify any current or planned initiatives that require IT support and alignment in the future that may influence prioritization
- Define the implications of each technology initiative, in terms of what they would enable and what they would not focus on
- Identify new or changed processes needed to support the plan, including process automation goals
- Identify technology standards to be added or updated to reflect the strategic vision

By the end of the analysis and prioritization activities outlined above, the DCTA and Accenture will have an intelligently curated list of top enabling opportunities that can be carried forward for further assessment.

Identification of Leading Products through Market Analysis

Leveraging the list of top enabling technology opportunities and an understanding of high-level needs, Accenture will identify top vendors and technical solutions in each of the relevant markets, where possible presenting back to DCTA 2 to 3 options per opportunity. Additionally, if an existing DCTA asset exists for the technology opportunity,

that asset will be assessed alongside potential solutions on the market in order to appropriately assess leveraging existing assets, versus deploying a new system. These analyses and recommendations will be a key input to the Value Realization and Business Case phase.

Our relationships with software vendors, built over our many years of experience in implementing industry leading solutions, have enabled Accenture to build a strong ecosystem of software vendor alliances covering the latest innovations in the market. These relationships span more than 150 alliance partners, some of which are depicted in Figure 13 below. Our alliances will allow us to uniquely match DCTA's needs with the capabilities of the top vendors and solutions, leading to a more robust decision-making framework from which DCTA can be best equipped to determine its most valuable path forward.



Figure 13: Accenture Technology Alliances

Additional Category—Cost Optimization Analysis

Many organizational transformations experience stress and challenges. Due to issues such as changing political priorities and cultural resistance, the results of most traditional cost optimization initiatives don't last. A 2015 Accenture study shows only 36% of surveyed companies agreed that their businesses sustained the benefits of cost optimization efforts. In many cases, the focus of the efforts was on a specific event or outcome—shedding X% of costs or Y# of staff members. The efforts did not focus on addressing the behavioral changes necessary for those results to endure. In our experience, organizations need to think about their operations from a zero-based perspective to find a route to new levels of effectiveness. Successful cost reduction efforts are: 1) led by a focus on service improvements, not just eliminating costs; 2) based on what an organization's costs "should be," given its vision and mission rather than driven by budget inertia; and, 3) foster new cultural norms that become deeply ingrained in the organization's mindset and behaviors. This is key to implementing durable cost reductions and continuous service improvements.

Figure 14 describes our Cost Optimization Analysis Framework. For the Assess Phase, our main focus will be limited to Steps 1-3, with subsequent steps related to implementation in future phases. Accenture will work with DCTA staff

to gather, organize and analyze spend, performance, staffing and other relevant data to gain insights needed to identify performance gaps. Once initiatives are identified, we will assign value targets based on benchmarks and/or our experience (e.g., savings of 10% by utilizing a different sourcing method for equipment). We then take the categorized set of initiatives from the value targeting task and prioritize them through workshops with the DCTA team and leadership. Initiatives will be prioritized, using specific pre-defined criteria (e.g., value/cost savings, ease of implementation, business disruption investment levels required, complexity, risk tolerance). Initiatives will also be organized into short-term/quick wins, mid-term, and long-term to calibrate implementation timelines. We will then integrate our findings and recommendations into the final set of recommendations across all workstreams.

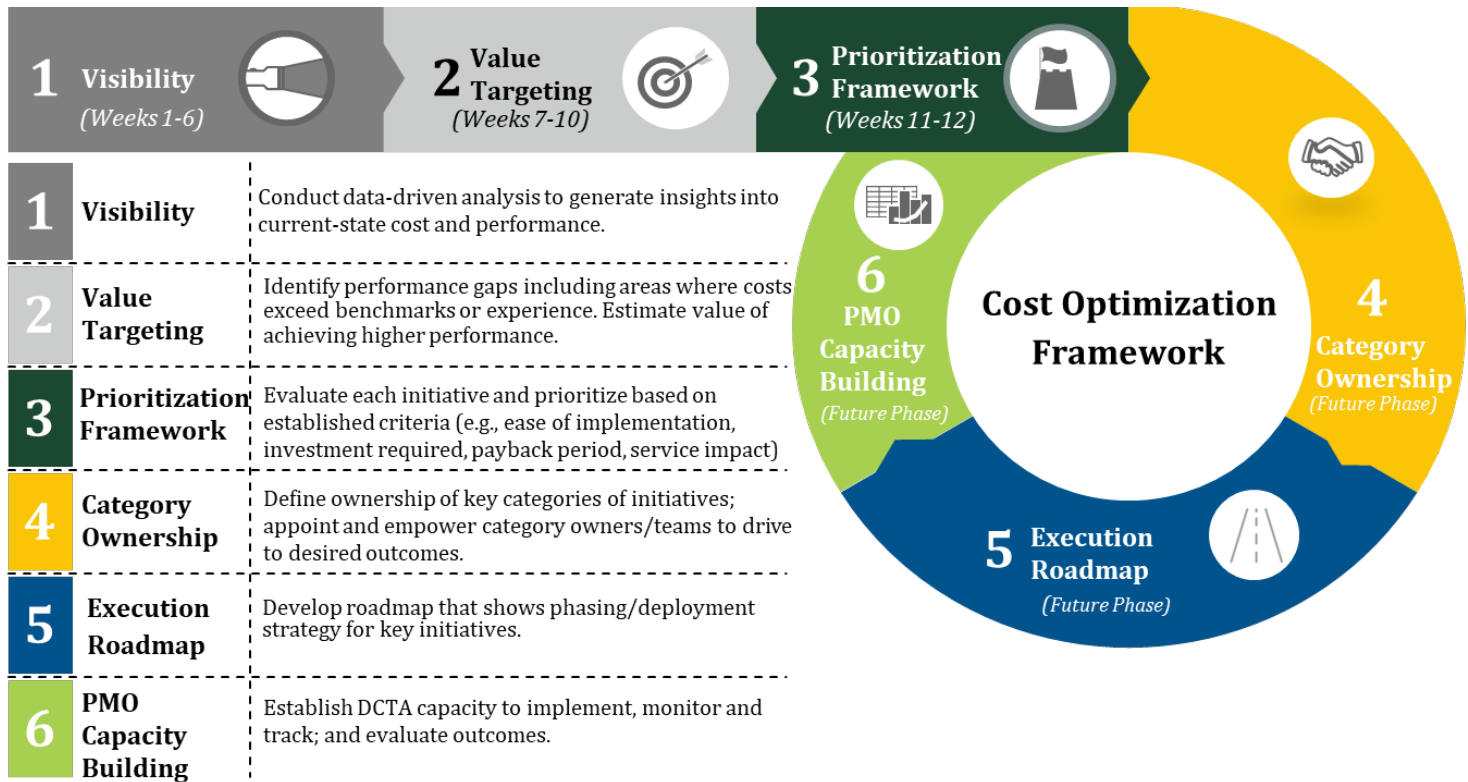


Figure 14: Cost Optimization Analysis Framework

5.0 Timeline

Provide proposed timeline for completion of the services requested in this RFP

Based on our understanding of DCTA Board discussions, and the new operating and financial imperatives created by the COVID-19 pandemic, we have prepared a project timeline to expedite delivery of assessment findings and recommendations for incorporation within DCTA's FY22 budget cycle.

We carefully structured our approach to address the objectives and requirements stipulated in the RFP and to provide the findings and recommendations quickly for review and action by DCTA leadership. We have also tailored the approach and timeline to support identification of potential operational or capital investments which could be defrayed using the CARES Act Section 5307 allocation to the Denton/Lewisville UZA. Drawing on other recent experiences with multiple transit and government agencies, we believe success will hinge on these critical factors:

1. Efficiently gathering data as soon as possible, in digital form where feasible, to expedite initiation of analysis
2. Rapid identification of impactful insights to highlight meaningful opportunities early in the project to drive improvement across DCTA and continue the current momentum for change in the organization
3. An action-oriented and practical work breakdown structure that accomplishes the RFP objectives within a short period of time, delivering options to the Board to shift resources to strategic transformation initiatives
4. Transparent communication, openness and a respectful, collaborative approach with DCTA and its stakeholders

With these factors in mind, we crafted the critical path of the project to build a realistic timeline for DCTA, depicted in Figure 15. This 12-week agency transformation assessment will be conducted through four main phases: (1) Planning & Visioning; (2) Current State Assessment; (3) Future State Definition; and (4) Roadmap & Next Steps. Additional information about the steps within each phase are detailed below.

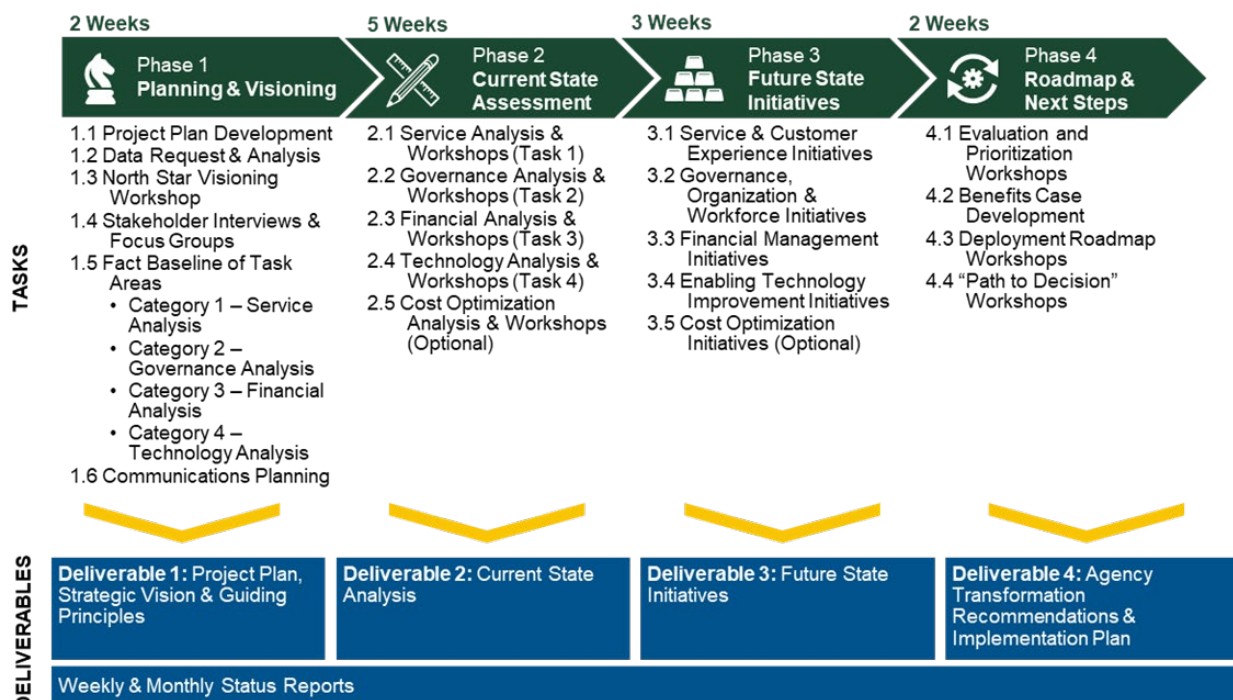


Figure 15: Components of the "Assess Phase" in Accenture's FORM Methodology

PHASE 1—PLANNING AND VISIONING



Planning a transformation initiative must be done in a systematic way that thoughtfully assesses “as is” and “to be” states of key dimensions, such as governance, information and data analysis, core functions and responsibilities, current leadership and policy priorities, communications, acquisition, workforce capacity, portfolio/program management, process improvement, and location of work. Phase 1 focuses on rapidly putting in place a project plan, execution strategy and communications plan before the in-depth work begins.

TASK 1.1—Project Plan Development

Accenture and the DCTA Project Manager will review a draft Project Plan, submitted by Accenture in Week 1. The project plan will detail key project tasks, milestones, and where practicable, project staffing for both the Accenture and DCTA. We will also identify stakeholders for individual and facilitated group interviews for the Governance Analysis. The Project Plan will be revised and finalized in Week 1 and reviewed by the Steering Committee thereafter.

TASK 1.2—Data Request and Analysis

The data request will involve collecting information that will assist us in establishing a fact base. The types of information we will collect includes strategic plans/priorities, organization and staffing charts, process documentation, prior studies, and performance data. Accenture would request only information relevant to the activities in this project.

TASK 1.3—North Star Visioning Workshop

Early in the Planning phase, we conduct a North Star Visioning Workshop with the Steering Committee. Using our human-centered design approach, we will craft a vision statement that reflects the desired target state for the future DCTA operation. We will also work closely with our DCTA counterparts to: 1) explore risks and address concerns that should be considered during the project, and 2) to develop criteria for project success. The purpose of this is to create a vision and common understanding of the goals, objectives, and barriers for the project. During the workshop, we employ a design thinking approach to exchange ideas, discuss industry and digital trends, and co-create an aspirational endpoint.

TASK 1.4—Stakeholder Interviews & Focus Groups

Early in the project, Accenture will seek guidance from the DCTA Project Manager and Executive Sponsor on key stakeholders we should interview and participants for focus groups. This step is focused on two goals: 1) socialize the North Star vision for the project and garner feedback so that impacted DCTA stakeholders begin to understand that they are part of the change and have ownership in the overall process; and 2) gather a complete picture of the efficacy of current structures including documentation of issues such as duplication, overlap, accountability levels, organizational layers, coordination issues, incentives and collaboration challenges.

TASK 1.5—Fact Baseline of Task Areas

In this task we will develop a baseline map of the organizational structure of DCTA—the major units, sub-units, roles & responsibilities, missions, interrelationships, FTEs by unit, and other characteristics. This baseline will provide our team and DCTA counterparts a common understanding of the current state, thereby giving us a launching point for proposing a new organizational structure. For each of the four major categories listed in the RFP (e.g., Service, Governance), we will develop a baseline of information from results of the data request.

TASK 1.6—Communications Planning

Experience with similar efforts tells us that communications is the “make or break” element of a successful organizational change initiative. Communications planning establishes the approach for the delivery of high quality, consistent, and frequent communications. Accenture will develop a general Communications Plan by identifying the impacted stakeholder groups, determining their communication needs, developing messages and message timing. This plan will then be revised in subsequent phases as new communications needs and requirements are identified.

PHASE 2—CURRENT STATE ASSESSMENT



Our engagement approach to assess the current state relies in part on design thinking type workshops. The workshops are designed to be interactive and make maximum use of the in-depth and historical knowledge of DCTA staff. Accenture, in collaboration with the DCTA, will prepare materials and design the workshops and meeting agendas to be interactive. We will use several techniques based on the principles of user-centric design thinking. For example, before each workshop we will conduct targeted interviews and send “pre-reads” with information about the workshop topic to prepare and set expectations for the participants. During workshops we employ interactive techniques, such as the “future headlines” method where participants interactively envision the best (and worst) outcomes. Among the techniques used is the “rose-bud-thorn” method where participants interactively describe and share their impressions of what is currently working well and should not be changed (roses), what is working OK but could be improved (buds) and what is not working well and is a pain point (thorns). We find these techniques make workshops and other group activities very engaging and interesting to the participants.

TASK 2.1—Service Analysis & Workshops

This step will include a review of services provided by DCTA to its ridership, identify gaps to industry leading practices, identify missed market opportunities and evaluate train, bus and mobility services against the list of factors specified in the RFP (e.g., density, frequency, reliability). We will utilize a combination of data analysis, best practice research, case studies of innovative agencies, and workshops to develop our recommendations. Accenture has teamed with Cambridge Systematics to conduct the Service Analysis.

TASK 2.2—Governance Analysis & Workshops

This step will include a SWOT analysis as well as a review of staffing structure, compensation analysis, organization structure and an analysis of the size of the agency. The work will rely on facilitated group interviews and data analysis. We will interview select Board members, community leaders, city officials, agency staff and regional partners. Accenture has teamed with Segal for the compensation portion of the Governance Analysis where we will leverage Segal’s prior work with DCTA in 2019.

TASK 2.3—Financial Analysis & Workshops

Given the significant changes to the financial condition of transit agencies in the post-COVID world, this will be a key step in our current state assessment. We will first familiarize ourselves with the key fiscal documents for DCTA (e.g., operating budget, capital budget, financial plans, CAFRs, and any Official Statements). We will examine opportunities for CARES Act funding accessible to DCTA, reserve policies, budgeting practices for asset depreciation and replacement costs. Finally, we will examine DCTA’s cost allocation model and suggest opportunities for improvement.

TASK 2.4—Technology Analysis & Workshops

The Accenture technology team evaluate the inventory of key administrative and operational systems for DCTA. Our work will include systems supporting the back office (e.g., finance, HR, procurement), major operational systems (e.g., asset management, scheduling), and customer facing systems (e.g., fare collection). We will also identify opportunities for innovative use of technology such as Robotic Process Automation (RPA) or analytics to improve decision support.

TASK 2.5—Cost Optimization Analysis & Workshops

Accenture is pleased to include a value-added service to DCTA at no additional cost related to cost optimization analysis. This task will leverage work from the Financial Analysis step and conduct a diagnostic evaluating the key levers for strategic cost reduction for DCTA. We will estimate the size of the cost savings opportunity and prioritize it based on factors such as risk of disruption, ease of implementation and investment needed.

PHASE 3—FUTURE STATE DEFINITION



TASK 3.1—Service & Customer Experience Initiatives

This step will involve identifying solutions and recommendations to the challenges, pain points and gaps to best practices identified in the Service Analysis. We will also examine ways to enhance the customer experience through process, organizational, and technology/digital improvements.

TASK 3.2—Governance, Organization & Workforce Initiatives

Stakeholder individual and group interviews will likely result in opportunities to improve coordination, collaboration and communications at DCTA in addition to other operational insights. We will also identify structural changes to DCTA that can improve coordination, reduce costs, or enhance service. Finally, by leveraging Segal's prior work at DCTA and review of staffing, benchmarks, organizational layers and span of control data—we will provide feedback to DCTA on opportunities related to the size of the agency.

TASK 3.3—Financial Management Initiatives

In this step, we will outline opportunities to improve financial management policies, practices, and operations for the areas in scope of the RFP. We will include initiatives related to adjusting reserve policies, improving the cost allocation model, improving the budgetary structure (and monthly reports). Finally, we will include any recommendations related to budgeting for asset depreciation and replacement costs.

TASK 3.4—Enabling Technology Initiatives

In identifying technology initiatives, our team recognizes that different types of applications address differing business needs and that those business needs have differing requirements for change and risk. For example, an application that provides an innovative capability that is still relatively new and untested may require a modernization approach that allows for rapid prototyping and change and embraces a 'fail fast' approach. In this case, a rapid failure is not something to be avoided, but celebrated - it allows the team to learn quickly and experiment to drive innovation. On the other hand, a system of record, such as a payroll system, is critical to an organization's operations. It requires a structured, measured approach to implementation that prioritizes risk avoidance and risk mitigation. Each of these options is delivered with differing levels of process rigor, governance,

and controls that are best aligned to the business need being addressed. We will identify initiatives to promote the correct modernization journey for each technology area, based on its risk profile and business need.

TASK 3.5—Cost Optimization Initiatives

Based on our experience and findings from the Current State Assessment as it relates to performance gaps, the Accenture team will include a prioritized list of initiatives with value targets for DCTA’s consideration. This list will be included in our final report for this project.

PHASE 4—ROADMAP & NEXT STEPS



TASK 4.1—Evaluation and Prioritization Workshops

We will develop a list of initiatives across the different workstreams and work with the DCTA team and Steering to prioritize them. The objective is to distill the options to a select number that balance value, risk, investment, etc. that will be part of a transformation plan. When feasible, these opportunities will be categorized as short term, mid-term and long term.

TASK 4.2—Benefits Case Development

The Benefits Case that we develop for DCTA will provide estimates of benefits (quantitative or qualitative) for key alternative organizational structures. The basis for the benefit case includes rough order of magnitude (ROM) estimates based on our experience and analysis derived from other tasks. Accenture will work with the DCTA to formulate a “Case for Action.” We will utilize financial metrics including payback period, net present value (NPV) and/or internal rate of return (IRR) to evaluate the value proposition for investing in a new organization model.

TASK 4.3—Deployment Roadmap Workshops

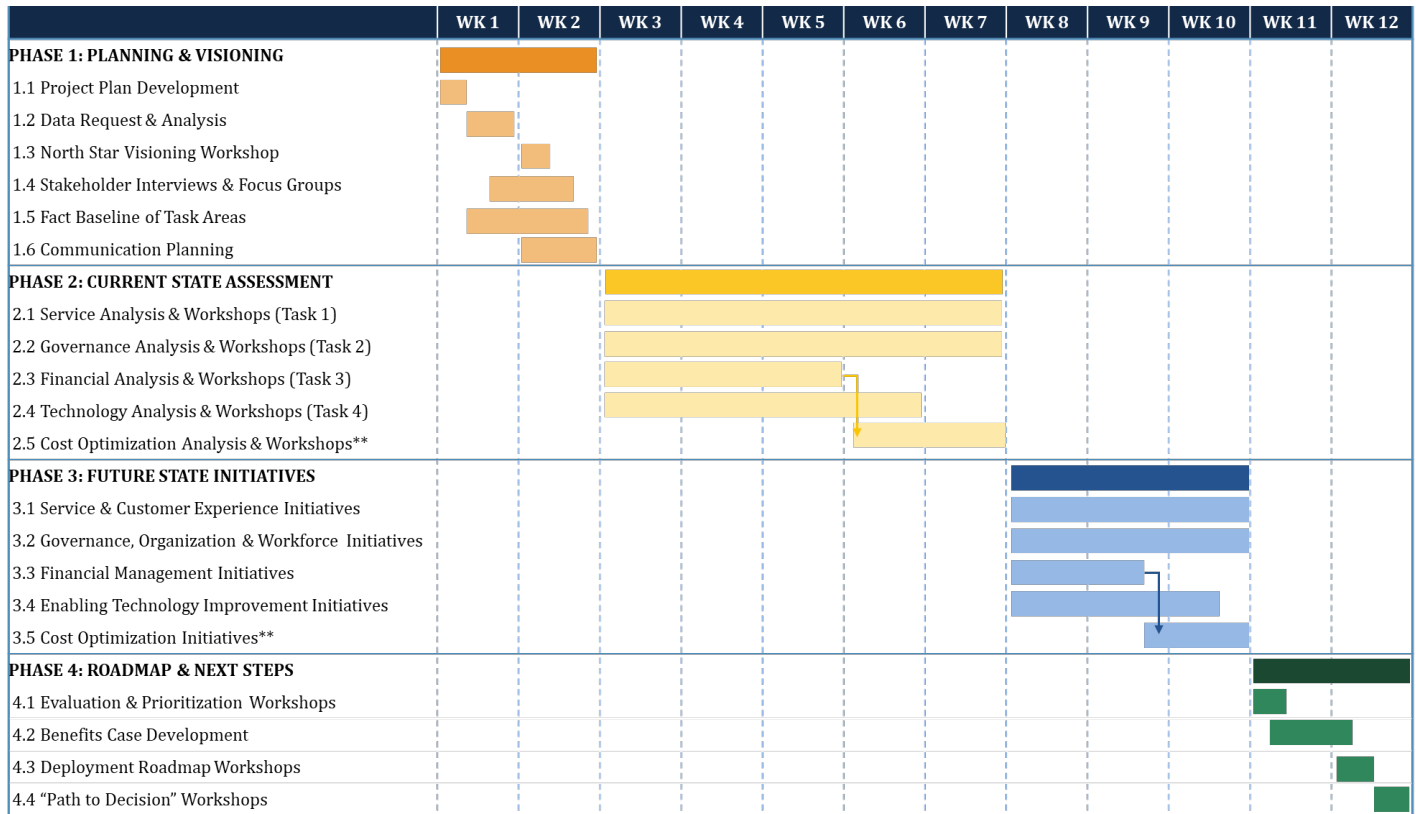
Accenture will work collaboratively with the DCTA team to help develop the pros and cons of alternative rollout scenarios for the initiatives and timelines. In our experience with clients undergoing similar transformation assessments, typically the changes are phased in, but there are other options to consider (e.g., Big Bang). The Roadmap we develop also highlights interdependencies between initiatives (if any) and recommends sequencing. Overall, the main objective is to pace the introduction of organizational changes with DCTA’s capacity to absorb them.

TASK 4.4—Path to Decision Workshops

Accenture’s project team will present the results of the Agency Transformation Recommendations and Implementation Plans to an audience designated by the DCTA Board and/or management. We will also facilitate workshops to document next steps for the actual implementation of the adopted Agency Transformation Plan.

In summary, we are proposing to move further and faster to help DCTA realize the desired outcomes for its customers and service-area residents. We listened to the Board's interest in identifying solutions quickly and possibly in advance of the upcoming July review of the Capital Budget and Long-Range Plan.

As a result, we drafted a schedule based on our 12-week assessment timeline as seen in Figure 16 below. Of course, we recognize a successful timeline must reflect leadership and staff operating responsibilities. We will collaborate with DCTA to verify the proposed timeline is both feasible and valuable for DCTA and its stakeholders.



** = Denotes Optional Task Executed Upon DCTA Approval

Figure 16: Proposed Project Timeline

6.0 Samples of Work

Provide at least two (2) samples of a similar study your firm has performed. Include information related to your roles and responsibilities with each sample.

VIA Metropolitan Transit—Corridor Planning

Cambridge Systematics role was to support Rapid Transit Corridor studies on VIA's regional multimodal options.

| NAME | RIDERSHIP Total daily passenger boardings | CONGESTION Amount of congestion bypassed | PRODUCTIVITY Passenger boardings each hour a bus operates | SITE POTENTIAL Index of development potential and urban form | ACCESS Number of jobs and residents near station areas | OVERALL |
|----------------------|----------------------------------------------|---------------------------------------------|--------------------------------------------------------------|-----------------------------------------------------------------|-----------------------------------------------------------|----------|
| Fredericksburg | HIGH | HIGH | HIGH | HIGH | HIGH | HIGH |
| Zarzamora | HIGH | HIGH | HIGH | HIGH | MED/LOW | MED/HIGH |
| Commerce-Houston | MED/HIGH | MED/HIGH | HIGH | HIGH | MED/LOW | MED/HIGH |
| San Pedro | MED/HIGH | HIGH | MED/HIGH | MED/HIGH | HIGH | MED/HIGH |
| New Braunfels Ave | MED/HIGH | MED/HIGH | HIGH | HIGH | MED/LOW | MED/HIGH |
| Looper/Military | HIGH | HIGH | LOW | MED/HIGH | MED/HIGH | MED/HIGH |
| Austin Highway | MED/LOW | MED/LOW | HIGH | MED/HIGH | MED/LOW | MED/LOW |
| Gen McMullen-Babcock | MED/LOW | MED/LOW | MED/LOW | HIGH | LOW | MED/LOW |
| Rockport/Roosevelt | MED/LOW | MED/LOW | HIGH | MED/LOW | LOW | MED/LOW |
| Bandera | LOW | MED/LOW | MED/LOW | HIGH | LOW | MED/LOW |
| Huebner-Grissom | LOW | LOW | LOW | MED/HIGH | LOW | LOW |
| FM 78 | LOW | LOW | LOW | MED/LOW | LOW | LOW |

Figure 17: High Capacity Corridor Evaluation

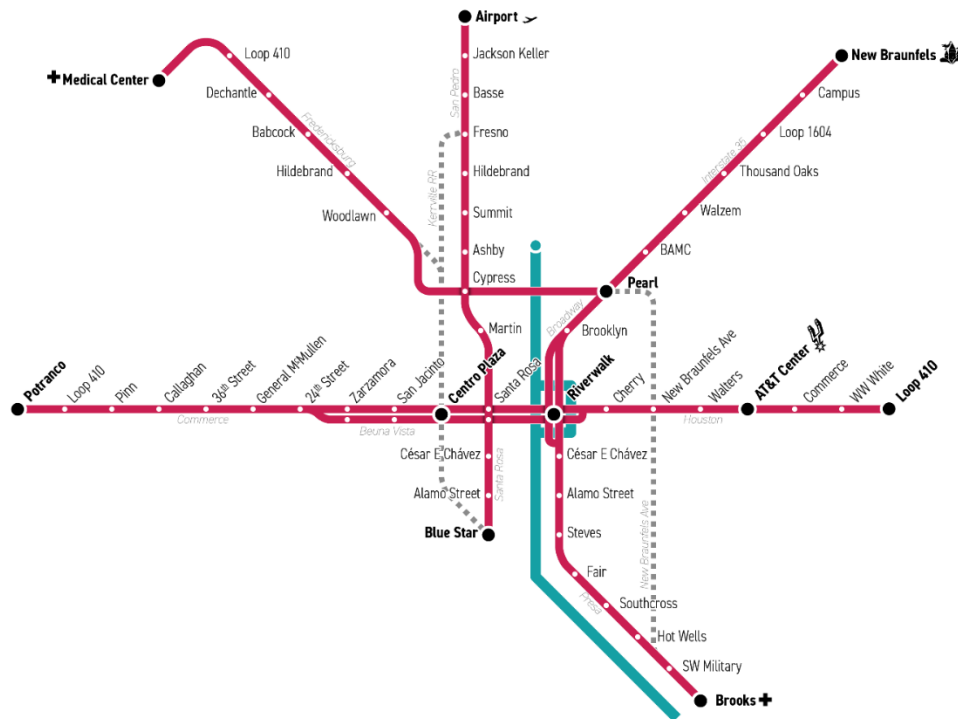


Figure 18: High Capacity Corridor Alternatives

Capital Area Metropolitan Planning Organization—Regional Transit Study

Cambridge Systematics role was to assess the market demand, benefits versus costs, and constraints associated with various mobility options within the CAMPO network.

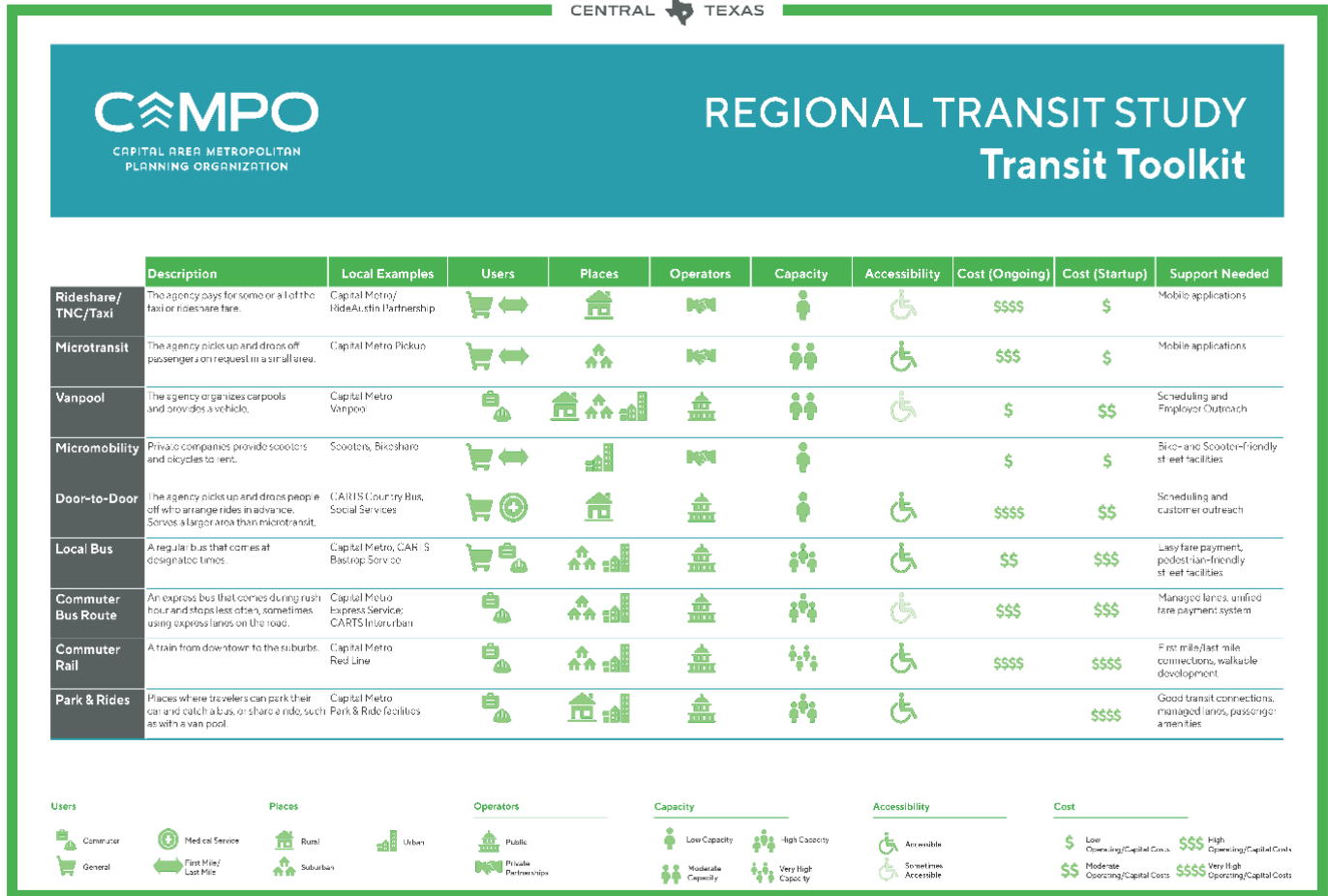


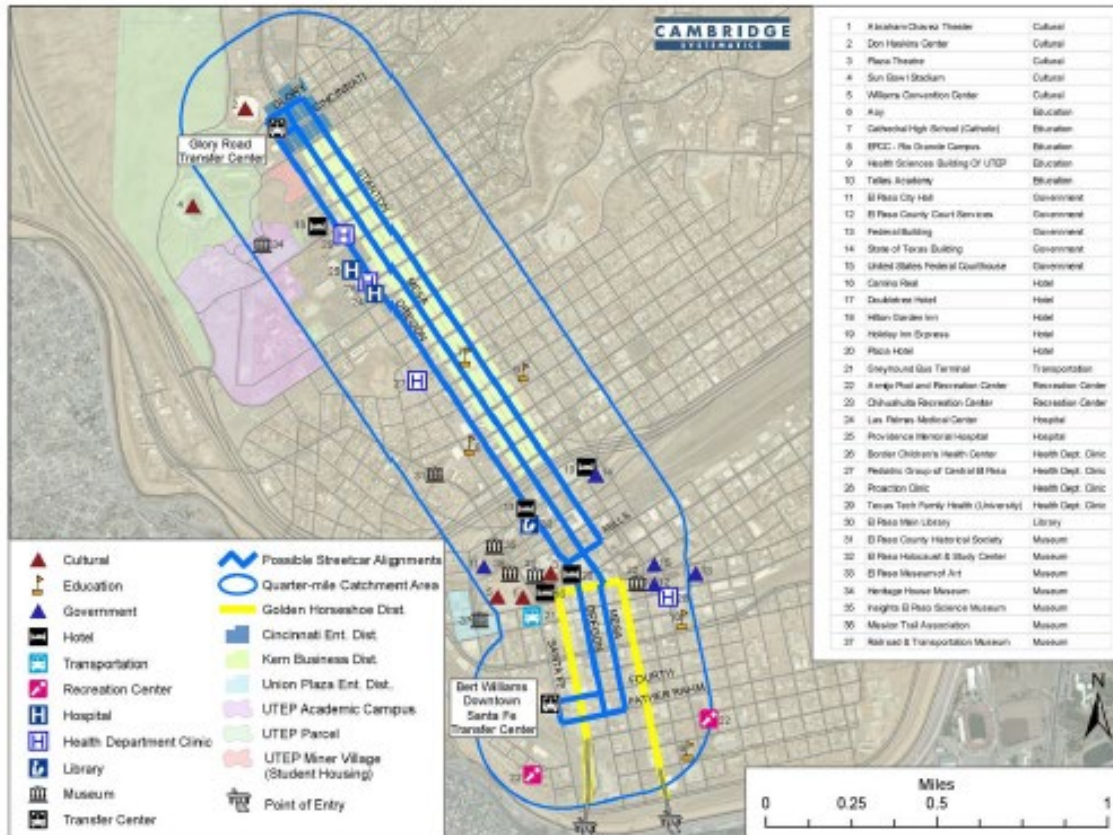
Figure 19: CAMPO Transit Toolkit

Texas Department of Transportation—El Paso Streetcar/Rail Transit Study

Cambridge Systematics role was to assess the market demand, benefits versus costs, and constraints associated with a proposed streetcar rail transit system linking the border crossing, downtown, and university area of El Paso, Texas.

El Paso Rail Transit Study

Exhibit 2.5 Major Travel Generators within the Comprehensive Study Area



2-20

Cambridge Systematics, Inc.

Figure 20: Travel Interests within Study Area

Large Urban County (Virginia)—Strategic Planning

Accenture's role was to conduct a broad-based community and employee engagement to hear their aspirations for and "pain points" with County government then develop a clear sense of the County's priorities.

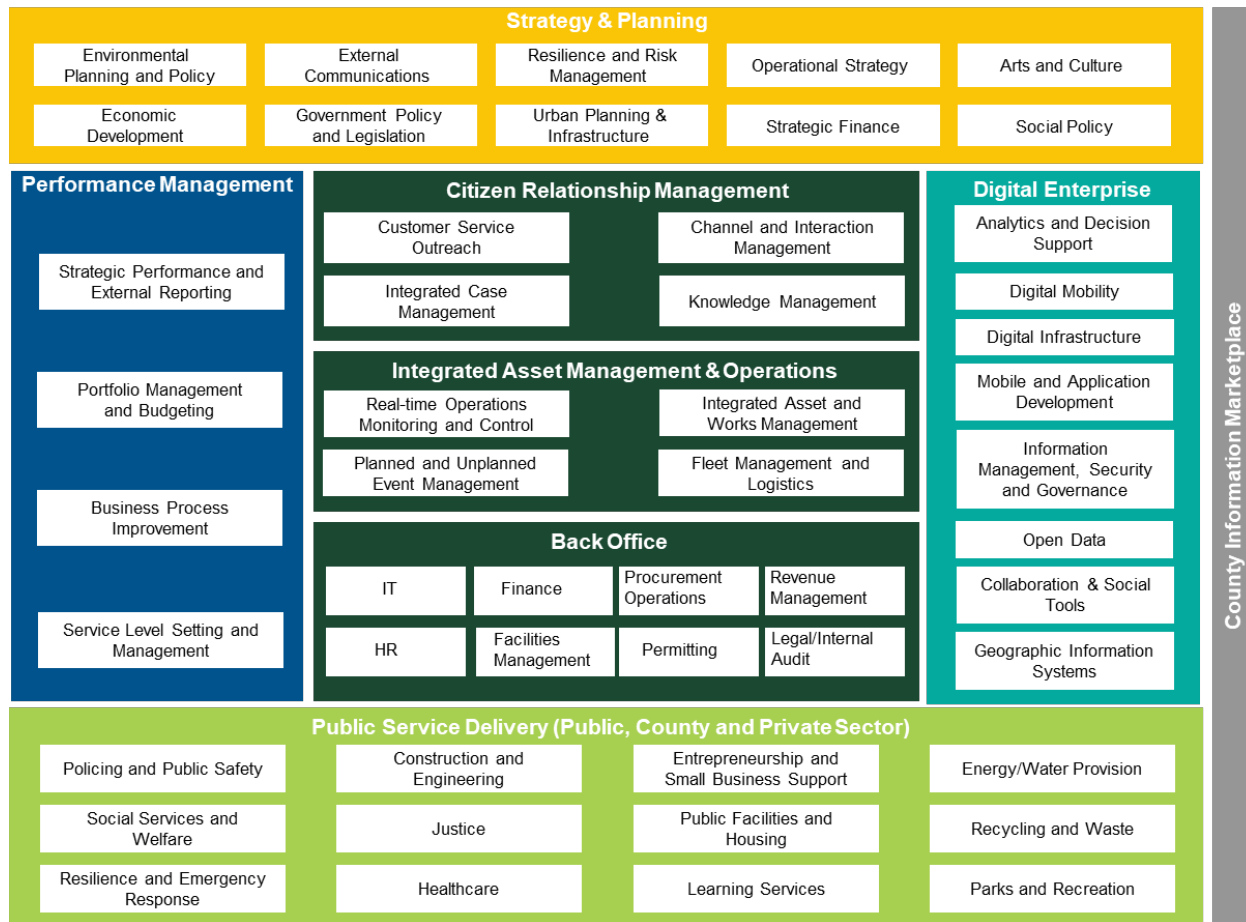


Figure 21: High-Performing Counties Logical Operating Model (LOM)

CAPABILITY MATURITY ASSESSMENT: SUMMARY

Capital Project Delivery—Maturity Analysis

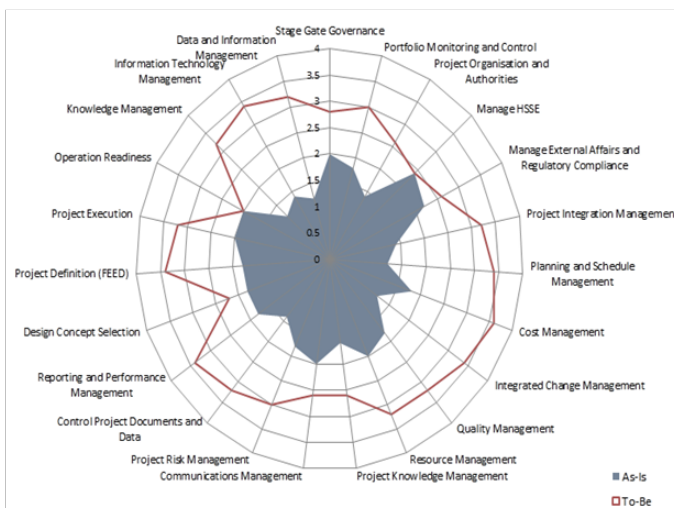


Figure 22: Capability Assessment (LOM Output)

Key Challenges

- The link between Stage Gate Methodology and detailed work processes for project planning and execution is not defined
- Compliance to governance guidelines is not consistent
- Integrated change management is not consistently enforced, impacting overall delivery quality and operations readiness
- Experienced and skilled resources are not effectively used for quality reviews
- Significant gaps exist in data sources, quality, consistency, use and governance
- Capability sourcing strategy is inadequately defined, increasing delivery cost and limiting options for geographic customisation
- Project performance is very dependent on individual experience/skill levels
- Application architecture is fragmented, limiting the ability to automate processes
- Talent management, workforce planning and skills development is not well planned or executed

Large Urban City (Texas)— “Budgeting for Results” Transformation

The City transitioned to new City Manager leadership in 2017 and sought a partner to guide their transition from long-standing practice of budgeting for incremental costs to management process that integrated department functions to focus on delivering services in the most effective and efficient manner for citizens.

Executive Summary

Current State—Strengths and Opportunities

Leadership identified aligning the budget hearings with the strategic priority areas and utilizing uniform offer submissions as key strengths in the FY16 budget process. Standardizing program architecture and tying the budget to performance management were identified as key opportunities for continued improvement.

| Strengths | Opportunities |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> •Aligning programs and Budget Hearings to Strategic Priority Areas •Simplifying and standardizing offer submission materials •Starting Budget Hearings with presentations on each Strategic Priority Area •Assigning Budget Hearing time slots based on size and complexity of offers •Supporting Budget Hearings with facilitator and time keeper to provide structure and keep hearings on schedule •Focusing hearing discussions on programs and outcomes instead of covering departmental costs •Making bold strategic decisions during an engaged deliberations process with input from the full Budget Commission •Starting to better connect budget decisions to strategies, KPIs, and targeted outcomes •Allocating funding at the program level •Supporting all processes with more structure and clearer guidelines (offers, budget hearings, deliberations, etc.) •Maintaining flexibility and adaptability throughout the process •Seeing County Manager and Executive Team’s active leadership and involvement throughout budget process | <ul style="list-style-type: none"> •Standardize program architecture and taxonomy •Expand budget process timeline and set due dates early to improve submissions and outcomes and decrease strain on Departments •Update PB system to better support budget process and to automate as much as of the budget process as possible, support development of new offers, generate reports quickly and accurately, account for partial FTEs at the program level, and link programs to Strategic Priority Areas •Confirm clear performance commitments for all programs once offers are accepted •Link annual budget process to a strong performance management approach to track spending and progress towards performance goals throughout the year to prep for next FY budget process •Create opportunity for citizen input early in the process •Set earlier and firm deadlines for revenue projections for next FY •Continue to train the departments on new budget process to help codify budget process and build into Fulton County “DNA” •Receive offers from non-government entities to improve outcomes •Continue to increase consistency in offer submissions •Base funding decisions on past FY performance •Continue BOC engagement throughout the budget process |

Figure 23: Strengths & Opportunities Review

Large Private University (Washington, DC)

The client had an HR department primarily focused around transaction processing and compliance. Local administrative units felt unsupported in strategic areas such as staff retention, compensation planning, and succession planning. The goal was to identify ways to improve service including migration to a new operating model.

HR Current State Findings Summary

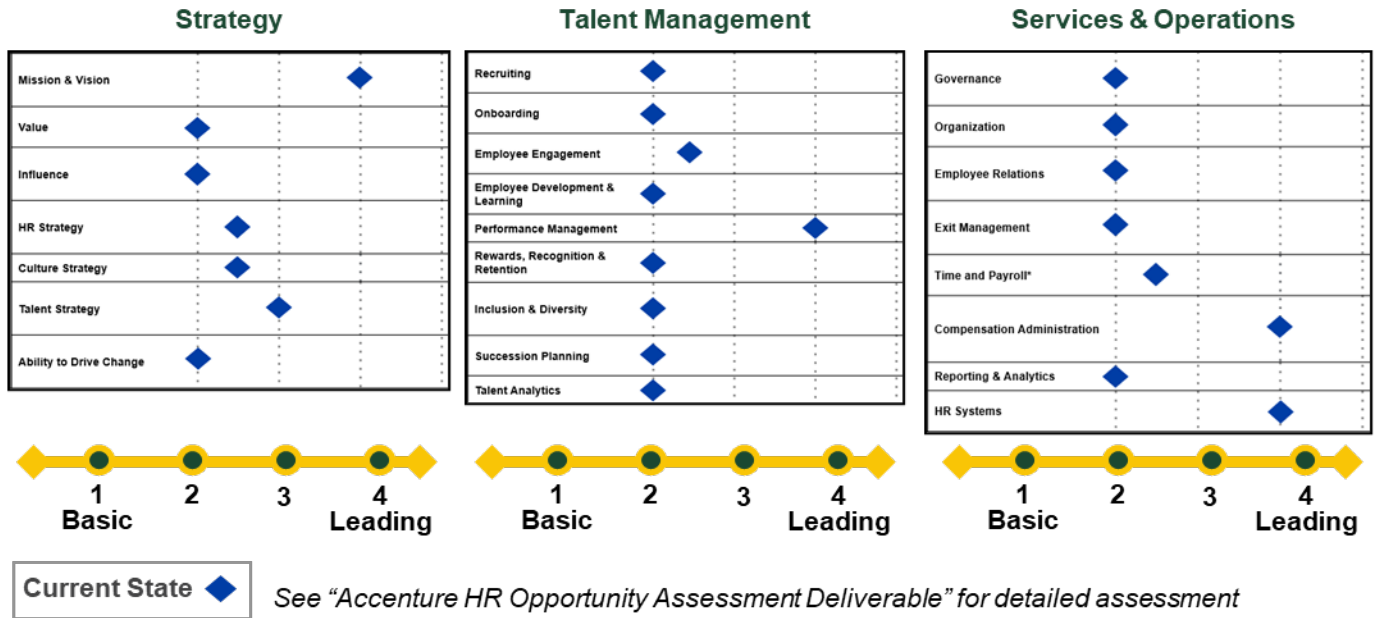
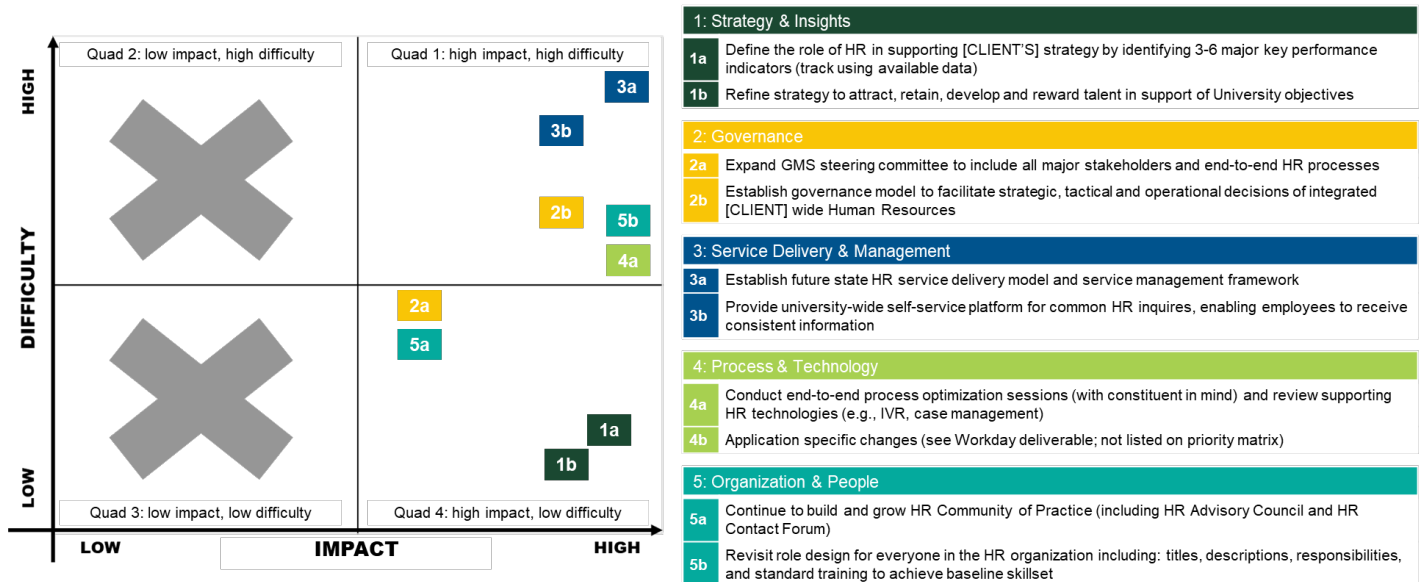


Figure 24: Current State Capability Assessment

Prioritized Opportunities

The team identified strategic opportunities and quick wins with the highest impact



Difficulty rating was determined by level of resources required, level of dependence on external partner, level of change management, and existence of similar initiatives already underway. Refer to the appendix of "Accenture HR Opportunity Assessment Deliverable" for explanation of prioritization criteria and difficulty details.

Figure 25: Opportunities on Value-Effort Matrix

Major Metropolitan Transit Agency (New York)

Client previously processed tasks using many disparate systems—often maintaining custom instances of the same software by entity. In order to create a platform for innovation and savings, the client consolidated these into a single Enterprise Resource Planning (ERP) system. Note the entities still maintained individual time-keeping instances.

| | Entity #1 | Entity #2 | Entity #3 | Entity #4 | Entity #5 | Entity #6 | Entity #7 |
|------------------|------------|----------------|------------|------------|------------|------------|------------|
| Call Center | None | Yes | None | Yes | Yes | None | Yes |
| Imaging | None | Blue Bird | Blue Bird | Microfiche | Filenet | None | None |
| Benefits Admin. | PeopleSoft | PeopleSoft | PeopleSoft | PeopleSoft | GEAC | PeopleSoft | GEAC |
| HR Admin. | PeopleSoft | PeopleSoft | PeopleSoft | PeopleSoft | PeopleSoft | PeopleSoft | Mainframe |
| Payroll | PeopleSoft | GEAC | GEAC | PeopleSoft | GEAC | PeopleSoft | Mainframe |
| Accounts Payable | PeopleSoft | PRAP | PRAP | PeopleSoft | Cullinet | Macola | PeopleSoft |
| Procurement | PeopleSoft | Mainframe | Mainframe | PeopleSoft | Mainframe | Mainframe | PeopleSoft |
| Accounting | PeopleSoft | GEAC | GEAC | PeopleSoft | Cullinet | Macola | PeopleSoft |
| Inventory | None | Mainframe | Mainframe | PeopleSoft | Mainframe | Mainframe | PeopleSoft |
| Timekeeping | PeopleSoft | ATS/UTS/Kronos | Kronos | PeopleSoft | Kronos | Kronos | Kronos |



| | Entity #1 | Entity #2 | Entity #3 | Entity #4 | Entity #5 | Entity #6 | Entity #7 |
|------------------|------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| Call Center | Siebel | | | | | | |
| Imaging | Universal Content Management | | | | | | |
| Benefits Admin. | PeopleSoft | | | | | | |
| HR Admin. | | | | | | | |
| Payroll | | | | | | | |
| Accounts Payable | | | | | | | |
| Procurement | | | | | | | |
| Accounting | | | | | | | |
| Inventory | Mainframe | Mainframe | | Maximo | | Mainframe | |
| Timekeeping | ATS/UTS/Kronos | Kronos | Kronos | Kronos | Kronos | Kronos | |

Figure 26: Technology System Assessment & Consolidation

7.0 References

Provide three (3) references for existing or current clients who you have worked with in the last five years.

Nothing speaks to our credentials like hearing first-hand stories from current and previous clients about our shared journey planning, delivering, and transforming their operations and systems. Listed below are our three (3) references whom we've worked with in the last five (5) years as requested.

| CLIENT REFERENCE #1 (Accenture) | | | |
|------------------------------------|--|--------------------------------------------------------------------------|---------------------------------------------|
| Client Name: | | Valley Metro Rail | Project Name: Capability Assessment |
| Original Budget: | | \$150k | Service Dates: May—June 2019 |
| Contact Name: | | Jim Hillyard | Contact Title: Chief Administrative Officer |
| Contact Email: | | jhillyard@valleymetro.org | Contact Phone: (602) 495-8234 |

| CLIENT REFERENCE #2 (Accenture) | | | |
|------------------------------------|--|----------------------------------------------------------|-------------------------------------------------------------------------------------------|
| Client: | | New York Metropolitan Transportation Authority (MTA) | Project: Business Service Center (BSC) Transformation & Enterprise Asset Management (EAM) |
| Original Budget: | | \$120M | Service Dates: BSC: Mar 2009—Mar 2013; Enterprise Asset Management (2014 to Present) |
| Contact Name: | | Wael Hibri | Contact Title: Deputy Chief Transformation Officer |
| Contact Email: | | wahibri@mtahq.org | Contact Phone: (212) 878-7115 |

| CLIENT REFERENCE #3 (Cambridge Systematics) | | | |
|------------------------------------------------|--|----------------------------------------------------------------------------|----------------------------------------------|
| Client: | | VIA Metropolitan Transit (VIA) | Project: General Planning Contracts |
| Original Budget: | | \$5M | Service Dates: 2014—Ongoing |
| Contact Name: | | Art Herrera | Contact Title: Manager of Strategic Planning |
| Contact Email: | | arturo.herrera@viainfo.net | Contact Phone: (210) 299-5800 |

8.0 Additional Data

Provide any additional information about your firm that may be relevant to this project or that might help the selection team in its assessment of proposals received.

As public transit authorities prepare to pivot to a multimodal future, they must depart from conventional wisdom and explore new approaches. Accenture research has identified five sets of capabilities that differentiate the type of “living business” that succeeds amid market turbulence. Disruption is a reality across industries. Our study of 10,000 firms finds that 71% are facing huge disruption. Public transit is no exception. So, how should governments and public transit authorities respond? Download the [Orchestrating a Mobility Ecosystem](#) report to find out more.

Each year, Accenture assesses the IT landscape to identify trends that will have the greatest impact on organizations in the years ahead. Accenture’s [Transit in Transition: Transportation Technology Vision 2019](#) study included a survey of 130 leaders in the passenger transportation sector from 12 countries. We found that 94% of transportation executives are experimenting with new technologies to unlock growth in the post-digital age.

Does your agency lack the tools to collect and harness the right information to make informed decisions for long-term transportation investments that optimize performance? The good news is there are tools available to gather and analyze data in order to improve decision-making, empowering agencies to get even better return on their investment. Download Cambridge Systematics new whitepaper: [Driving Transportation Performance through Data Management and Analytics](#) to find out more.

Recent research efforts have demonstrated existing Analysis, Modeling, and Simulation (AMS) tools have limited capabilities to properly reflect the impacts of a proactive management approach on driver behavior through the full trip chain. The trip chain in this report refers to the full range of decisions made by travelers, such as destination choice, time-of-day choice, mode choice, route choice, and facility/lane choice. Download Cambridge Systematics report: [Active Transportation and Demand Management Trajectory-Level Validation](#) to find out more.

Dynamic pricing is about optimizing a key business outcome - typically revenue-related, but it could also be focused on customer service and satisfaction, capacity control, or other factors. Just as each company has its own competitive strategy, each has its own unique pricing strategy. As transport reinvents, disruptive digital tech—the Internet of Things (IoT), smart products, real-time intelligence and connectivity plus artificial intelligence and data analytics—will form the backbone of rail and transit travel. Download [Dynamic Pricing: Mobility in the New](#) to find out more.

An intelligent back office (IBO) completely breaks the mold and works less like a bureaucracy and more like an enabler of new value. IBO has three fundamental characteristics - people-centered experiences, digital on the inside and a data-driven backbone. Transformation to the IBO is not a finite project, but rather a mindset of continuous improvement. Download [From Bureaucracy to Value Engine: The Intelligent Back Office](#) to find out more.

The [Big Zero](#) shows how to achieve startup speed at enterprise scale. How? By transforming a culture right down to its foundations and aligning the strategic priorities of the entire organization. Reinvigorating people’s mindsets and behaviors. Endowing them with the ownership of what and how they spend and where they redeploy the savings. Download [Getting Ahead by Cutting Back](#) to find out more.

9.0 Professional Fees

Provide your fee for services, including your firm's hourly rate and a comprehensive cost for the first phase of the analysis as outlined in the scope of work.

[1] **Fee for Services (all-inclusive firm fixed price):** \$789,500 for 12-week Agency Transformation Initiative - Assessment Phase. This firm fixed price includes the comprehensive cost to deliver the scope defined in this proposal, including the fees for Accenture staff and our teaming partners Cambridge Systematics and Segal. Given the COVID environment, we have budgeted a lower amount for travel than customary for this scope of work as we assume we will need to conduct as much of the work as possible remotely via a mutually agreed upon digital and collaboration platforms (e.g., MS-Teams and Zoom). Should COVID circumstances change before project start, we can work with DCTRA to get the right mix of work onsite and remote. We assume that Accenture will provide DCTA with a milestone invoicing schedule as we complete the final contract.

[2] **Hourly Rate:** Accenture's hourly labor rates range between \$195 to \$475 per hour, with the mix of skills and rates varying depending on the type of work to be delivered. As DCTA retains Accenture for additional work, we will draw upon the right types of skills and experiences needed and fixed fees will be based on actual work to be done.

[3] **Key Pricing Assumptions:** (a) DCTA staff and stakeholder participation is required for data collection, interviews, and workshops as described in the proposal; (b) the Assess Phase project timeline is 12 weeks; (c) DCTA will provide information in our Data Request by Week 3 and so we can stay on schedule we need DCTA to respond to follow up data requests as soon as practical; (d) the compensation related work for the Governance Analysis will leverage the benchmarking and other analyses already completed for DCTA by Segal—their incremental work in this project will be limited to the areas specified in the Approach section of this response; (e) DCTA will provide feedback on draft deliverables by seven days after completion, and (f) Accenture reserves the right to modify its proposed pricing based on completion of due diligence activities, final approval by Accenture management, and the DCTA and Accenture's agreement on a definitive agreement covering the work associated with this RFP.

Legal Disclaimer

Accenture's proposal is submitted in response to Denton County Transportation Authority's ("DCTA") RFP 20-11 for its Agency Transformation Initiative. Accenture is submitting this proposal with the express understanding and condition that DCTA and Accenture will have an opportunity to work together in a spirit of cooperation to discuss, clarify and agree upon the specific scope of services, responsibilities between the parties, assumptions, and contract terms applicable to the proposed services. Specifically, if selected, Accenture looks forward to negotiating a mutually acceptable agreement with DCTA based upon the terms and conditions in the RFP, subject to obtaining greater clarity and mutual agreement on the terms of the standard terms and conditions as they will apply specifically to this scope of work. Accenture looks forward to DCTA considering the inclusion of discreet modified terms and conditions including specific terms associated with Limitation of Liability, Intellectual Property Ownership, Termination (whether for cause or convenience), Warranty, Indemnity, Insurance, Client Responsibilities, Acceptance and Governance. Nothing in this document shall form the basis for any contract, and nothing contained in this document will be binding against Accenture unless expressly agreed to by Accenture under a formal contract. All representations and warranties, whether express or implied by statute, law, or otherwise, are hereby excluded.

Accenture interprets the following words and phrases used in the solicitation and this proposal in the manner indicated: "maximize," "optimize," and "optimal" mean to improve to a commercially reasonable degree; "minimize" means to reduce to a commercially reasonable degree; "best" means leading or of a high standard; "partner" and "partnerships" do not mean a legal partnership, but rather a collaborative relationship; "right," where used as an adjective, means appropriate; and "ensure" and "enable" mean to use commercially reasonable efforts to implement.

This document was prepared on the instructions and information given by DCTA and, accordingly, no responsibility is accepted for any inaccuracy or error or any action taken or not taken in reliance on this document.

These limitations are not in any way intended to restrict continuing business discussions between DCTA and Accenture.

The pricing contained in this proposal is based on known criteria supplied to date by DCTA. Accenture reserves the right to modify this pricing based on completion of due diligence activities, final approval by Accenture management, and DCTA and Accenture's agreement on a definitive contract covering the work associated with this pricing.



June 11, 2020

Ms. Athena Forrester
Denton County Transportation Authority
1955 Lakeway Drive, Suite 260 Lewisville,
Texas 75057

Dear Ms. Forrester:

Thank you for the opportunity to further discuss the Accenture Team's proposal to support DCTA's Agency Transformation Initiative. I am pleased to provide DCTA with this version of a Best and Final Offer (BAFO). This BAFO includes adjustments to the scope and pricing of the initial phase of this project given the discussion we had and the feedback and priorities that you have now shared with us last week. The intent of this letter is to convey adjustments that we propose as a revised offer for your consideration.

Best and Final Offer:

In our discussions we understand that the initial phase of the Transformation Initiative should especially emphasize assessments and recommendations regarding both the Service and Technology areas of DCTA's organization. We understand while the Governance and Financial areas are important that a higher level of analysis could be performed in these areas given the more pressing needs of DCTA now. In forming this revised offer, we took your feedback on the Service, Technology, Financial and Governance/Organization areas under consideration. As a result, we propose the following adjustments for the initial phase of DCTA's Transformation Initiative:

1. The scope of the Service and Technology workstreams will remain the same as described in our proposal. We will also underscore that our analysis and recommendations for these two workstreams will emphasize how DCTA may streamline or optimize its workload and workflows by using automation in place of manual processes. We also understood that DCTA leadership is very open to what the future of service might look like as well.
2. The compensation study has been removed from the initial phase of this project and can be reserved as an optional future service since DCTA completed a study in the last year.
3. The scope for the Governance and Organization workstream will now represent a high-level assessment of the of DCTA's organization and governance model covering these components:
 - a. Organization Structure, including Span of Control and share of overall DCTA staff assigned to Functions
(i.e., % of overall number of DCTA staff dedicated to IT or marketing functions)
 - b. Governance/Management Structure
 - c. Roles, including Role Descriptions
 - d. Staffing and Training expenditures
 - e. Supervisory Practices
 - f. Talent and Performance Management

In the area of Budget & Finance, we understand that the ELAP study is underway by DCTA Executive Staff. We propose that our work cover up to five critical aspects of DCTA's financial structure and Budgeting approach. We suggest and propose that we be flexible at this point as to the best way to do this so we can

make our work in this area most impactful to you. We suggest that we work together during our planning step to determine which aspects could be most impactful to DCTA. We understand you are particularly

concerned about DCTA's reserve policy, its implications on member-city financial and cash positions, and that the current approach to budgeting and reporting depreciation has created confusion for the Board. Our analysis and work will include a crisp assessment of these.

We understand that time is of the essence for the DCTA, so we propose that the timeline and schedule for this initial phase of the Transformation Initiative continue as twelve (12) weeks. Given the adjustments reflected earlier, **we propose to adjust down our professional fees as a BAFO to the amount of \$667,000 (a 15.5% reduction from our initial proposal to DCTA).** We do want to thank you for your feedback on our scoping and approach. If you find that we need to make other adjustments, we are happy to talk further about this.

On behalf of our team we are very excited to work with you on this very important assignment. Thank you again for the opportunity to serve you and the DCTA.

Regards,

A handwritten signature in black ink, appearing to read "R Cohan".

Rob Cohan
Managing Director—Strategy & Consulting
Accenture LLP

**Accenture
Transformation Initiative
Added Scope**

Confirmed addition of the following two items, within the existing scope and price.

1. DCTA's compliance efforts – what compliance-related items are staff responsible for?
 - a. Page 38 – "Government Compliance offerings that support end-to-end finance and budget processes, along with regulatory compliance."
2. Administrative overhead research – what is the typical administrative overhead (%) for an agency of our size?
 - a. BAFO – "Organization Structure, including Span of Control and share of overall DCTA staff assigned to Functions (i.e., % of overall number of DCTA staff dedicated to IT or marketing functions)"

