

Background/Justification

The Engineering Department of the North Texas Municipal Water District delivers a complex and growing portfolio of capital projects that are critical to system reliability, regulatory compliance, and service to customers. As project size, complexity, and delivery expectations increase, variability in delivery practices, coordination, and supporting processes has introduced inefficiencies and increased exposure to cost, schedule, and delivery risk. This variability also limits the District's ability to consistently evaluate performance and prioritize improvement efforts.

The Engineering Department currently manages a capital improvement program consisting of approximately 140 active projects with a combined construction value of approximately \$10 billion. The department includes 2 Engineering Managers, 6 Program Managers, 25 Project Managers, 6 Project Controls staff, and 2 Administrative staff, and is responsible for delivering projects across multiple delivery methods and phases of execution. The breadth and complexity of this portfolio require consistent project delivery practices, effective governance, and reliable performance measurement.

Accordingly, the District seeks to conduct a Capital Project Delivery Assessment to establish a clear, objective understanding of current delivery capabilities, identify strengths and gaps across the project lifecycle, and provide leadership with prioritized, practical recommendations for improvement. An external consultant will be engaged to perform an independent assessment and benchmark the District against peer owner agencies and industry best practices.

A similar assessment was conducted approximately ten years ago, which led to a period of growth and expansion within the Engineering Department. However, those findings require re-evaluation in light of current demands, organizational maturity, and evolving industry standards. A renewed roadmap is needed to guide the District's approach to project delivery, including alignment with industry practices, effective workload balancing, and the development of meaningful performance metrics.

This assessment will support informed leadership decision-making and provide a foundation for strengthening the District's capital project delivery program and associated auditing capabilities in a practical, scalable, and sustainable manner.

These needs define the basis for the scope of services described below.

Selection Criteria

The District will utilize the following selection criteria as the basis for evaluating the consultant's response to this RFP. The relative weight of each selection criterion is provided in parentheses.

- Relevant Project Experience and Past Performance (40%)
- Key Personnel Qualifications (40%)
- Project Approach and Methodology (20%)

Project Scope Statement

The Engineering Department seeks a comprehensive, department-wide assessment of capital project delivery practices, governance structures, and supporting processes across the full project lifecycle. The assessment shall evaluate current-state capabilities and performance and benchmark them against peer owner agencies and applicable industry best practices.

The Consultant shall develop and deliver prioritized, actionable recommendations to improve the effectiveness, consistency, and scalability of the District's capital project delivery program. This effort shall include the development of a five-year implementation roadmap aligned with organizational goals and resource constraints.

The assessment shall include a combination of document review, stakeholder interviews, data analysis, and facilitated workshops as necessary to validate findings and ensure alignment with District leadership and staff.

At a minimum, the assessment shall address the following:

- Alignment of current practices with applicable industry standards and best practices
- Evaluation and development of performance metrics and key performance indicators (KPIs)
- Assessment of organizational structure, including recommendations for restructuring if warranted
- Evaluation of staffing levels, roles, and support resources required to meet current and projected workload demands
- Analysis of workload distribution and capacity across the department
- Review of the Project Management Information System (PMIS) and associated reporting tools for effectiveness, usability, and alignment with program needs

Scope of Services

Project Initiation and Work Plan

- kickoff meeting
- detailed schedule
- communication protocols
- stakeholder engagement plan

Current-State Assessment

- document review
- interviews
- PMIS evaluation
- workflow/process review
- organizational analysis

Benchmarking and Gap Analysis

- peer comparison
- standards alignment
- maturity assessment
- risk/gap identification

Recommendations and Roadmap Development

- prioritization
- sequencing
- resource considerations
- implementation strategy

Final Reporting and Executive Workshop

- final report
- presentation
- facilitated leadership session

Goals, Objectives, and Deliverables

The primary objective of this effort is to provide the District with a clear, objective understanding of current capital project delivery performance and a practical, prioritized path forward for improvement.

The Consultant shall produce the following deliverables:

1. Capital Project Delivery Assessment Report

A comprehensive report documenting the results of the assessment. At a minimum, the report shall:

- Establish a clear, shared baseline of current capital project delivery capabilities across the full project lifecycle
- Identify and prioritize practical improvement opportunities to reduce delivery risk and improve cost, schedule, and coordination outcomes
- Provide leadership with credible, decision-ready information to support future investments and organizational improvements
- Document benchmarking results relative to peer agencies and industry best practices

2. Five-Year Implementation Roadmap

A strategic, phased roadmap for implementation of recommended improvements. At a minimum, the roadmap shall:

- Prioritize recommendations based on impact, effort, and organizational readiness
- Define implementation sequencing and key milestones
- Identify required resources, including staffing, tools, and budget considerations
- Provide actionable steps to transition from current-state to desired future-state capabilities

3. Executive Presentation and Stakeholder Workshop

The Consultant shall present key findings and recommendations to District leadership and facilitate a workshop to review, validate, and refine prioritization of recommended improvements.

Schedule**Assumptions**

- The District will provide the Consultant with reasonable access to relevant documents, data, and systems necessary to perform the assessment, including but not limited to project records, policies, procedures, and PMIS data.
- The District will facilitate access to key personnel across the Engineering department and other relevant stakeholders for interviews, workshops, and information gathering activities.
- District staff will be available to participate in scheduled meetings, workshops, and review sessions in a timely manner to support project progress.
- Existing documentation, data, and systems are assumed to be sufficiently complete and reliable for the purposes of conducting the assessment. The Consultant shall identify any significant data gaps or limitations encountered.
- The assessment will be conducted based on current organizational structure, processes, and tools in place at the time of execution. Major organizational changes occurring during the assessment may require adjustment to the scope or schedule.
- Benchmarking will be based on publicly available information, the Consultant's experience, and comparable peer owner agencies, unless otherwise specified by the District.
- The Consultant's recommendations and roadmap will be advisory in nature. Implementation of recommendations will be at the discretion of the District and is not included in this scope unless otherwise authorized.
- The five-year implementation roadmap will be developed at a planning level and will not include detailed design, procurement documents, or implementation execution plans unless specifically requested.
- The Consultant shall coordinate all activities through a designated District point of contact.

Exclusions

Unless specifically authorized by the District in writing, the following services are excluded from this scope of work:

- Implementation of recommended organizational, process, or technology changes identified during the assessment
- Development of detailed operational procedures, manuals, or standard operating procedures (SOPs)
- Procurement support, including preparation of procurement documents, software selection, or vendor evaluation services
- Detailed configuration, customization, migration, or implementation of PMIS or other software systems
- Preparation of detailed staffing plans, compensation studies, or human resources policy recommendations
- Performance of individual employee evaluations or personnel actions
- Independent financial audits or forensic reviews
- Development of detailed cost estimates, schedules, or execution plans for future capital projects
- Legal, regulatory, or compliance opinions
- Engineering design services, construction management services, or project-specific technical reviews
- Ongoing program management or implementation support beyond completion of the final deliverables

Constraints

The following constraints shall be considered by the Consultant in performance of the work:

- The assessment and recommendations shall be developed in a manner that is practical, scalable, and sustainable within the District's operational and organizational environment.
- Recommendations shall consider the District's existing organizational structure, staffing capacity, budget limitations, and ongoing capital delivery commitments.
- The Consultant shall minimize disruption to ongoing Engineering Department operations and coordinate stakeholder engagement activities to reduce impacts on staff workload and active project delivery efforts.
- Recommendations shall be prioritized with consideration for implementation feasibility, organizational readiness, and long-term maintainability.
- The assessment shall account for the District's role and responsibilities as a public-sector owner agency, including applicable governance, procurement, and regulatory considerations.
- Any benchmarking or comparison to peer agencies shall consider differences in organizational size, delivery model, capital program complexity, and available resources.
- The Consultant shall remain vendor-neutral and shall not recommend proprietary systems, software, or services without clearly documenting the basis for the recommendation and evaluating alternatives where appropriate.
- The implementation roadmap shall be developed at a strategic planning level and within a realistic timeframe that reflects anticipated staffing, funding, and operational constraints over the five-year planning horizon.
- Recommendations shall, to the extent practical, align with existing District standards, policies, and technology platforms unless a clear justification for deviation is provided.

Dependencies

The successful completion of this assessment is dependent upon the following:

- Timely availability of District staff for interviews, workshops, meetings, and review activities throughout the duration of the project.
- Timely access to relevant documentation, data, reports, policies, procedures, PMIS information, and other materials necessary to support the assessment.
- Active participation and engagement from Engineering Department leadership and key stakeholders to validate findings, priorities, and recommendations.

- Availability and reliability of existing project delivery, staffing, workload, schedule, and financial data needed to support analysis and benchmarking activities.
- Coordination between the Consultant and designated District representatives to support scheduling, communication, and decision-making.
- Timely review and feedback by the District on interim findings, draft deliverables, and final recommendations to maintain the agreed project schedule.
- Consultant access to appropriate peer benchmarking information, whether through publicly available sources, professional experience, or comparable agency participation.
- Continuity of key District personnel and organizational functions during the assessment period. Significant organizational or operational changes occurring during the assessment may affect schedule, findings, or recommendations.
- Availability of sufficient funding and authorization to complete the assessment and deliverables as defined in the scope of work.

Risks

The following risks may affect the quality, schedule, or effectiveness of the assessment and resulting recommendations:

- Limited availability of key District personnel due to ongoing operational responsibilities and active capital project delivery demands may reduce stakeholder participation or delay information gathering activities.
- Incomplete, inconsistent, or outdated documentation and data may limit the Consultant's ability to fully evaluate current-state performance, workload distribution, or delivery effectiveness.
- Variability in stakeholder perspectives, priorities, or levels of engagement may impact alignment on findings, recommendations, and implementation priorities.
- Organizational changes occurring during the assessment period, including staffing changes, restructuring efforts, or shifts in capital program priorities, may affect assessment outcomes or roadmap assumptions.
- Benchmarking comparisons may be limited by differences in organizational structure, project delivery models, funding mechanisms, or available data among peer agencies.
- Recommendations that require significant organizational, cultural, technological, or process changes may face implementation challenges related to funding, staffing capacity, change management, or operational readiness.
- Dependence on existing PMIS and reporting capabilities may limit the accuracy, consistency, or availability of performance metrics used in the assessment.
- Delays in District review and feedback on interim findings or draft deliverables may impact the overall project schedule and timely completion of final deliverables.
- Long-term implementation priorities identified in the five-year roadmap may be affected by future changes in regulatory requirements, funding availability, technology platforms, or District strategic priorities.

Project Milestones

Procurement:

- Project Charter development and approval
- RFP development and issuance

Assessment:

- Consultant selection and onboarding
- Assessment planning and execution
- Draft findings review and validation

Deliverables:

- Final assessment delivery
- Leadership workshop

- Leadership adoption and phasing decision documentation

Success Criteria

The project will be considered successful if it:

- Provides leadership with actionable and prioritized recommendations
- Establishes measurable improvement opportunities
- Produces an implementation roadmap aligned with District capacity
- Achieves stakeholder alignment on future-state priorities
- Supports sustainable improvements in capital project delivery performance