

## PROCUREMENT SUMMARY

## ENTERPRISE SAFETY MANAGEMENT SYSTEM/PS43249000

1.	<b>Contract Number:</b> PS43249000	
2.	<b>Recommended Vendor:</b> Cority Software, Inc.	
3.	<b>Type of Procurement (check one):</b> <input type="checkbox"/> IFB <input checked="" type="checkbox"/> RFP <input type="checkbox"/> RFP-A&E <input type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order	
4.	<b>Procurement Dates:</b>	
	A. <b>Issued:</b> 7/10/17	
	B. <b>Advertised/Publicized:</b> 7/10/17	
	C. <b>Pre-Proposal Conference:</b> 7/19/17	
	D. <b>Proposals Due:</b> 8/24/17	
	E. <b>Pre-Qualification Completed:</b> 2/10/18	
	F. <b>Conflict of Interest Form Submitted to Ethics:</b> 5/7/18	
	G. <b>Protest Period End Date:</b> 6/22/18	
5.	<b>Solicitations Picked up/Downloaded:</b> 38	<b>Bids/Proposals Received:</b> 5
6.	<b>Contract Administrator:</b> Ana Rodriguez	<b>Telephone Number:</b> (213) 922-1076
7.	<b>Project Manager:</b> Al Martinez	<b>Telephone Number:</b> (213) 922-2956

**A. Procurement Background**

This Board Action is to approve Contract No. PS43249000 issued to develop, configure, integrate, and implement a new Enterprise Safety Management System. Board approval of contract awards are subject to resolution of any properly submitted protest(s).

RFP No. PS43249 was issued in accordance with Metro's Acquisition Policy and the contract type is a firm fixed price.

Two amendments were issued during the solicitation phase of this RFP:

- Amendment No. 1, issued on July 26, 2017, revised SP-05, Insurance Requirements;
- Amendment No. 2, issued on August 7, 2017, extended the proposal due date to August 24, 2017.

A pre-proposal conference was held on July 19, 2017 and was attended by 10 participants representing eight firms. There were 12 questions submitted and responses were released prior to the proposal due date.

A total of 38 firms downloaded the RFP and were included on the plan holders list. A total of five proposals were received by the due date of August 24, 2017.

## **B. Evaluation of Proposals**

A Proposal Evaluation Team (PET) consisting of staff from Metro's Information Technology Services Department, Risk Management Department, and Metro Operations Department including Service Planning and Scheduling, Bus and Rail Operations, and Maintenance was convened and conducted a comprehensive technical evaluation of the proposals received.

The proposals were evaluated based on minimum requirements and the following evaluation criteria and weights:

- Proven Software Solution 40 percent
- Work Plan/Project Approach 20 percent
- Experience and Qualifications of Contractor and Proposed Personnel 20 percent
- Price 20 percent

Several factors were considered when developing these weights, giving the greatest importance to the proven software solution.

The PET began its independent evaluation of the proposals on August 25, 2017. Of the five proposals received, two proposals were determined to be outside the competitive range and were not included for further consideration. The remaining three firms were within the competitive range and are listed below in alphabetical order:

1. Cority Software, Inc.
2. Intelex Technologies, Inc.
3. Transportation Resource Associates, Inc.

The PET conducted interviews, oral demonstrations and requested clarifications from the firms in the competitive range between September 22, 2017 and January 17, 2018. During the interviews and demonstrations, the firms had the opportunity to present their team's qualifications and demonstrate their proven software solution. The firms also responded to the questions posed by the PET which included their assessment of the implementation challenges and plan to address the challenges and their data migration methodology.

After the interviews concluded, Metro requested additional technical information and clarifications. The clarifications resulted in a better understanding of the firms' project management approach, proposed hosting solutions, and plan to build the required interfaces. The PET finalized the scores on January 19, 2018. The final scoring determined Cority Software, Inc. to be the highest qualified proposer and Metro engaged in further technical discussions and negotiations with the firm from January 2018 through April 2018.

## **Qualifications Summary of Firms within the Competitive Range:**

### **Cority Software, Inc.**

Cority Software, Inc. (Cority) is an organization that specializes in environmental, health, safety and quality software. Cority has over 30 years experience in providing quality software solutions. Their proposed project team includes subject matter experts that have worked on large public transportation implementations such as the New York MTA and the Connecticut Department of Transportation.

Cority's software provided ample out-of-the-box functionality and they demonstrated a user-friendly, configurable system with a supporting mobile application. Additionally, their work plan, and project management approach were confirmed through clarification questions to be in line with Metro's expectations. Their proposal also included the migration of historical data into the new system and their assistance in building interfaces through flat files and application program interfaces (APIs) to be provided by Cority. Cority's software will be an on-premise solution as required by the Scope of Services. Overall, Cority's written proposal, demonstration, and thorough responses to Metro's clarification questions showed that they understood Metro's requirements and are prepared to meet them.

### **Intelex Technologies, Inc. (Intelex)**

Intelex Technologies, Inc. (Intelex), based out of Toronto, Canada has 25 years of experience providing safety management software. Their proposed software solution was determined to meet Metro's needs in terms of the functionality; however, Metro requested a self-hosted, on-premise solution and Intelex proposed Software-as-a-Service, cloud-based solution. Additionally, Intelex proposed a subcontractor to manage the implementation of the software; however, the proposed subcontractor had not managed an implementation for a major transportation agency. Furthermore, staff confirmed that the proposed Project Manager did not have a technical background. Metro requested clarification on the proposed Project Manager's role and Intelex's responded with a multi-pronged project management approach that would shift the ultimate technical oversight to a technical lead. Metro did not feel that this approach would fulfill the requirements envisioned for the Project Manager. Furthermore, Intelex could not confirm that all interfaces specified in the RFP would be built as part of their implementation but would need further information sessions with Metro to be able to price the building of the required interfaces and Metro would need to provide the APIs. Metro did not feel that Intelex understood Metro's needs nor that they provided a proposal that fully addressed Metro's requirements.

**Transportation Resource Associates, Inc.**

Transportation Resource Associates, Inc. (TRA) is headquartered in Philadelphia, Pennsylvania and is the incumbent provider of Metro's safety system. Although TRA is familiar with Metro's needs and environment, their new proposed software, IndustrySafe, did not appear to be as user-friendly as other proposed solutions and appeared to need some customization to meet Metro's requirements. In addition, the mobile solution was still in development as of the date of the demonstrations and a mobile application was required as part of the Scope of Services. While TRA appeared to understand Metro's requirements, their proposed solution did not best meet Metro's needs.

A summary of the final scores is presented below.

<b>1</b>	<b>Firm</b>	<b>Average Score</b>	<b>Factor Weight</b>	<b>Weighted Average Score</b>	<b>Rank</b>
<b>2</b>	<b>Cority</b>				
<b>3</b>	Proven Software Solution	84.00	40.00%	33.60	
<b>4</b>	Work Plan/Project Approach	90.05	20.00%	18.01	
<b>5</b>	Experience and Qualifications of Contractor and Proposed Personnel	86.50	20.00%	17.30	
<b>6</b>	Price	92.47	20.00%	18.49	
<b>7</b>	<b>Total</b>		<b>100.00%</b>	<b>87.40</b>	<b>1</b>
<b>8</b>	<b>Intelex</b>				
<b>9</b>	Proven Software Solution	78.00	40.00%	31.20	
<b>10</b>	Work Plan/Project Approach	64.70	20.00%	12.94	
<b>11</b>	Experience and Qualifications of Contractor and Proposed Personnel	66.00	20.00%	13.20	
<b>12</b>	Price	100.00	20.00%	20.00	
<b>13</b>	<b>Total</b>		<b>100.00%</b>	<b>77.34</b>	<b>2</b>
<b>14</b>	<b>TRA</b>				
<b>15</b>	Proven Software Solution	62.00	40.00%	24.80	
<b>16</b>	Work Plan/Project Approach	58.03	20.00%	11.61	
<b>17</b>	Experience and Qualifications of Contractor and Proposed Personnel	69.00	20.00%	13.80	
<b>18</b>	Price	36.91	20.00%	7.38	
<b>19</b>	<b>Total</b>		<b>100.00%</b>	<b>57.59</b>	<b>3</b>

### **C. Cost/Price Analysis**

The recommended price has been determined to be fair and reasonable based upon an independent cost estimate, adequate price competition, cost analysis, technical analysis, fact finding, and negotiations.

	<b>Proposer Name</b>	<b>Proposal Amount</b>	<b>Metro ICE</b>	<b>Negotiated amount</b>
1.	Cority	\$1,297,500	<b>\$1,926,080</b>	<b>\$1,292,925.80</b>
2.	Intalex	\$1,195,563		
3.	TRA	\$3,238,738		

### **D. Background on Recommended Contractor**

The recommended firm, Cority, is located in Toronto, Canada, and has been in business since 1985. With over 800 global clients and 250 employees around the world, Cority is one of the industry leaders in their field of environmental, health, and safety software. Their comprehensive work plan, methodology, schedule and above all, user-friendly software will provide Metro with a clear roadmap of how to transition from its legacy systems and move forward with this critical aspect of Metro's operations.