

PROCUREMENT SUMMARY

SAFETY ENGAGEMENT AND RECOGNITION PROGRAM/
PS52341001, PS52341002, PS52341003

1.	Contract Number: PS52341001, PS52341002, PS52341003	
2.	Recommended Vendor: CASCO International, Inc. (C.A. Short Company) MTM Recognition Corporation The Peavey Corporation	
3.	Type of Procurement (check one): <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.	Procurement Dates:	
	A. Issued: 6/8/18	
	B. Advertised/Publicized: 6/8/18	
	C. Pre-Proposal Conference: 6/13/18	
	D. Proposals Due: 7/16/18	
	E. Pre-Qualification Completed: 9/19/18	
	F. Conflict of Interest Form Submitted to Ethics: 8/31/18	
	G. Protest Period End Date: 2/25/19	
5.	Solicitations Picked up/Downloaded: 54	Bids/Proposals Received: 3
6.	Contract Administrator: Ana Rodriguez	Telephone Number: (213) 922-1076
7.	Project Manager: Raymond Lopez	Telephone Number: (213) 922-4065

A. Procurement Background

Two solicitations were previously issued as follows:

1. Request for Proposals (RFP) No. PS36101 was issued on 01/27/17 as a small business prime and was open to Metro's SBE certified firms. Metro did not receive any proposals for this solicitation.
2. Request for Proposals (RFP) No. PS39967 was issued on 04/01/17 with a 10% DBE Goal. Metro received one proposal; however, the proposal was determined to be non-responsive due to not meeting the DBE goal.

This Board Action is to approve Contract Numbers PS52341001, PS52341002, and PS52341003 to CASCO International, Inc. (C.A. Short), MTM Recognition Corporation, and The Peavey Corporation, respectively, in support of Metro's Safety Engagement and Recognition Program. Board approval of contract awards are subject to resolution of any properly submitted protest.

RFP No. PS52341 was issued in accordance with Metro's Acquisition Policy and the contract type is firm fixed price.

One amendment was issued during the solicitation phase of this RFP:

- Amendment No. 1, issued on July 6, 2018, extended the proposal due date.

A pre-proposal conference was held on June 13, 2018 and was attended by eight participants representing seven firms. A total of 13 questions were received and responses were provided prior to the proposal due date.

On July 16, 2018, Metro received three proposals from the firms listed below in alphabetical order:

1. CASCO International, Inc. (C.A. Short Company)
2. MTM Recognition Corporation
3. The Peavey Corporation

B. Evaluation of Proposals

The Proposal Evaluation Team (PET) consisting of staff from Metro's Corporate Safety, Bus Operations, Maintenance Operations, and representatives from the Amalgamated Transit Union (ATU) and the International Sheet Metal, Air, Rail and Transportation Workers Union (SMART) was convened and conducted a comprehensive technical evaluation of the proposals received.

The RFP required that all proposals shall be evaluated first on the minimum qualifications (pass/fail) basis. Any proposer that received a single fail for any of the minimum qualifications, as defined, would be eliminated from further consideration. The minimum qualifications are as follows:

1. A minimum of five years experience successfully managing and providing employee safety engagement and recognition programs.
2. Provided safety recognition program services for at least five distinct entities with at least 2,000 employees.
3. Provide a letter from your firm's financial officer or accountant attesting that the firm's gross revenues exceed \$2 million annually for the last three years.

All three proposals met the minimum qualification requirements and were further evaluated based on the following evaluation criteria and weights:

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|---|------------|
| • Degree of the Prime's Skills and Experience | 30 percent |
| • Proposer's Team | 15 percent |
| • Technical Capacity and Effectiveness of Execution of Plan | 35 percent |
| • Cost Proposal | 15 percent |
| • DBE Participation | 5 percent |

Several factors were considered when developing these weights, giving the greatest importance to technical capacity and effectiveness of execution of plan.

Between July 17, 2018 and July 26, 2018, the PET conducted its independent evaluation of the proposals. All three proposals received were determined to meet the minimum qualifications, and were subsequently evaluated based on the evaluation criteria above. The three firms were also invited to participate in interviews.

On August 3, 2018 the PET interviewed the three proposing firms. The firms were requested to focus their presentation on providing specifics and details on their implementation plan for Metro's program and to demonstrate how Metro employees would experience the program. In general, all firms provided an overview of their program and the recognition and awards that would be available to the employees. In addition, the proposing teams responded to the questions from the PET regarding the level of administrative burden to Metro, the level of support they would provide, the training that would be provided to employees, and the tax implications of their rewards program. In order to obtain the best pricing for Metro, a Best and Final Offer (BAFO) request was sent to all three firms who responded with their final pricing. All three firms have committed to the DBE incentive program and the proposer's DBE score was factored into the Proposer's final evaluation total score.

The following is a summary of the PET scores:

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	The Peavey Corporation				
3	Degree of the Prime's Skills and Experience	89.33	30.00%	26.80	
4	Proposer's Team	37.33	15.00%	5.60	
5	Technical Capacity and Effectiveness of Execution of Plan	71.14	35.00%	24.90	
6	Cost Proposal	100.00	15.00%	15.00	
7	DBE Participation Incentive	100.00	5.00%	5.00	
8	Total		100.00%	77.30	1
9	C.A. Short Company				
10	Degree of the Prime's Skills and Experience	78.67	30.00%	23.60	
11	Proposer's Team	47.33	15.00%	7.10	
12	Technical Capacity and Effectiveness of Execution of Plan	82.86	35.00%	29.00	
13	Cost Proposal	90.84	15.00%	13.63	
14	DBE Participation Incentive	65.20	5.00%	3.26	
15	Total		100.00%	76.59	2

16	MTM Recognition Corporation				
17	Degree of the Prime's Skills and Experience	76.00	30.00%	22.80	
18	Proposer's Team	46.00	15.00%	6.90	
19	Technical Capacity and Effectiveness of Execution of Plan	83.43	35.00%	29.20	
20	Cost Proposal	87.40	15.00%	13.11	
21	DBE Participation Incentive	62.40	5.00%	3.12	
22	Total		100.00%	75.13	3

As stated in the RFP, Metro intended to award up to three contracts for the services during the pilot program. Based on the evaluation, the recommended firms are listed below in alphabetical order:

Contract No.	Firm
PS52341001	CASCO International, Inc. (C.A. Short Company)
PS52341002	MTM Recognition Corporation
PS52341003	The Peavey Corporation

C. Price Analysis

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

	Proposer Name	BAFO Proposal Amount (Base + Options)	Metro ICE	Award Amount (Base+Options)
1	C.A. Short Company	\$11,550,000 (Base \$300,000 Options \$11,250,000)	\$10,653,600	\$11,550,000 (Base \$300,000 Options \$11,250,000)
2	Peavey Corporation	\$10,492,500 (Base \$300,000 Options \$10,192,500)		\$10,492,500 (Base \$300,000 Options \$10,192,500)
3	MTM Recognition	\$12,009,128 (Base \$287,188 Options \$11,721,940)		\$12,009,128 (Base \$287,188 Options \$11,721,940)

D. Background on Recommended Contractors

CASCO International, Inc. (C.A. Short Company)

C.A. Short was founded in 1937 and is headquartered in North Carolina with locations all across the United States. C.A. Short provides employee recognition

services, service and performance awards, OSHA compliant safety incentive awards, instant award programs, and offers an online engagement platform.

The Peavey Corporation

The Peavey Corporation (Peavey) has been in business for 48 years and is based in Kansas. In 1990, Peavey developed a unique game-card based incentive program tied to the safety industry which they have been successfully implementing to assist organizations in improving safety. They have experience with large organizations such as DHL, Bechtel-Canada, PNM Resources, Ceva Freight, and the Missouri Department of Transportation.

MTM Recognition Corporation

MTM Recognition Corporation (MTM) is located in Oklahoma. MTM has provided recognition awards and solutions for large and small corporations and organizations since 1971. Over the last 47 years, MTM has worked with many organizations such as Fortune 100 corporations, governments, and sports teams, to provide recognition programs. Some of their clients include the Washington Metropolitan Area Transit Authority, City of Dallas, the United States Navy, Adobe, McDonald's, DQ, Alg, Lowes, HNTB, and Farmers Insurance.