

## PROCUREMENT SUMMARY

TAP SYSTEM INNOVATIVE ENHANCEMENTS FOR SEAMLESS CONNECTIVITY  
WITH MULTI-MODAL MOBILITY PROGRAMS/PS 6394500

1.	<b>Contract Number:</b> PS 6394500	
2.	<b>Recommended Vendor:</b> Vertiba, LLC	
3.	<b>Type of Procurement (check one):</b> <input type="checkbox"/> IFB <input type="checkbox"/> RFP <input type="checkbox"/> RFP-A&E <input checked="" type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order	
4.	<b>Procurement Dates:</b>	
	<b>A. Issued:</b> October 20, 2016	
	<b>B. Advertised/Publicized:</b> N/A	
	<b>C. Pre-Proposal Conference:</b> N/A	
	<b>D. Proposals Due:</b> October 31, 2016	
	<b>E. Pre-Qualification Completed:</b> November 7, 2016	
	<b>F. Conflict of Interest Form Submitted to Ethics:</b> November 1, 2016	
	<b>G. Protest Period End Date:</b> N/A	
5.	<b>Solicitations Picked up/Downloaded:</b> 1	<b>Bids/Proposals Received:</b> 1
6.	<b>Contract Administrator:</b> Anush Beglaryan	<b>Telephone Number:</b> (213) 418-3047
7.	<b>Project Manager:</b> Robin O'Hara	<b>Telephone Number:</b> (213) 922-2411

**A. Procurement Background**

This Board Action is to approve single source Contract No. PS 6394500 issued to provide enhancements to the existing Customer Relationship Management (CRM) System for the regional TAP Smart Card Program. The existing Customer Relationship Management System is furnished by Vertiba, LLC.

The RFP was issued in accordance with Metro's Acquisition Policy and the contract type is a Firm Fixed Price. One amendment was issued during the solicitation phase of this RFP. Amendment No.1 issued on October 20, 2016, extended the proposal submittal due date.

**B. Evaluation of Proposals**

The Proposal Evaluation Team (PET) consisting of staff from TAP Program/Finance and Bike Share convened and conducted a comprehensive technical evaluation of the proposal received.

The proposal was evaluated based on the established evaluation criteria stated in the RFP, which are appropriate and consistent with criteria developed for other similar procurements.

During the week of October 31, 2016, the PET met and evaluated the proposal. The PET conducted fact finding and negotiations via telephone with Vertiba's Project Manager and key team members.

**C. Cost/Price Analysis**

The recommended price has been determined to be fair and reasonable based upon technical evaluation, cost analysis, fact finding, and negotiation. The independent cost estimate (ICE) did not account for the mobile application and gift card functions that are required in the scope of work. In addition, the hourly labor rates used in the ICE were lower than labor rates for Los Angeles County. As a result, the ICE is lower than the NTE amount.

	<b>Proposer Name</b>	<b>Proposal Amount</b>	<b>Metro ICE</b>	<b>NTE Amount</b>
<b>1.</b>	<b>Vertiba, LLC.</b>	<b>\$4,850,000</b>	<b>\$3,400,000</b>	<b>\$4,750,000</b>

**D. Background on Recommended Contractor**

The recommended firm, Vertiba, LLC (Vertiba), headquartered in Boulder, Colorado with offices in Texas, California, Oregon, Arizona, North Carolina, and Utah, has been in business since 2010. Vertiba is a global leader in Salesforce platform implementations, technology and creativity. Vertiba has extensive experience implementing customer relationship management systems and solutions, all based on the Salesforce platform. Vertiba has gained national prominence for its innovative work on the Salesforce platform, and its ability to deliver outstanding results for its clients. Furthermore, Vertiba is a Gold-level Salesforce implementation partner with consultants throughout the United States and is ranked in the top 3 for customer satisfaction among all 700+ certified partners.

Vertiba has successfully completed similar projects for Bay Area Rapid Transit (BART) in the greater San Francisco area as well as for the State of California Department of Transportation (Caltrans). Vertiba has identified key personnel who will be working closely with staff to ensure successful implementation and completion of the project.

The existing Customer Relationship Management (CRM) System for the TAP Service Center was implemented by Vertiba. In 2015, Metro entered into an agreement with Vertiba to integrate Metro's unique TAP programs into the CRM.