

PROCUREMENT SUMMARY

METRO LEADERSHIP ACADEMY / PS54336000

1.	Contract Number: PS54336000	
2.	Recommended Vendor: Southern Methodist University Cox School of Business	
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: June 21, 2018	
	B. Advertised/Publicized: June 18, 2018	
	C. Pre-Proposal Conference: N/A	
	D. Proposals Due: July 25, 2018	
	E. Pre-Qualification Completed: October 15, 2018	
	F. Conflict of Interest Form Submitted to Ethics: July 30, 2018	
	G. Protest Period End Date: November 23, 2018	
5.	Solicitations Picked up/Downloaded: 23	Bids/Proposals Received: 1
6.	Contract Administrator: Marc Margoni	Telephone Number: (213) 922-1304
7.	Project Manager: Stephanie Burke	Telephone Number: (213) 418-3105

A. Procurement Background

This Board Action is to approve the award of Contract No. PS54336000 to Southern Methodist University Cox School of Business (SMU) in support of Talent Development's 2019 Metro Leadership Academy.

Request for Proposal (RFP) No. PS54336 was issued in accordance with Metro's Acquisition Policy and the contract type is firm fixed price. The RFP was issued as a Race Conscious Disadvantaged Business Enterprise (RC DBE) with a 5% DBE goal.

No amendments were issued during the solicitation phase of this RFP.

There were two questions received and responses were released prior to the proposal due date.

A total of 23 firms downloaded the RFP and were included on the planholders list. A total of one proposal from Southern Methodist University Cox School of Business was received on the due date of July 25, 2018.

A market survey was conducted shortly thereafter inquiring as to why members on the Planholders list elected not to participate in the solicitation. Those who responded presented various reasons for the lack of participation such as: not being able to adequately fulfill the Statement of Work; not having the proper accreditation;

believing the Leadership Academy RFP was a construction project; and timing of the solicitation was not conducive to the contractor's business timelines.

B. Evaluation of Proposals

A Proposal Evaluation Team (PET) consisting of staff from Talent Development, Countywide Planning and Development, Accounting, and Talent Acquisition was convened and conducted a comprehensive technical evaluation of the proposal received.

The proposal was evaluated based on the following evaluation criteria and weights:

- Past Performance of Similar Work 25 percent
- Qualifications of Proposed Personnel 25 percent
- Consultant's Proposed Process and Approach 30 percent
- Price 20 Percent

The evaluation criteria are appropriate and consistent with criteria developed for other, similar procurements. Several factors were considered when developing these weights, giving the greatest importance to Consultant's proposed process and approach.

During the week of August 22, 2018, the PET met and conducted an independent technical evaluation and deemed SMU technically qualified to perform the tasks as outlined in the RFP.

Qualifications Summary of Firm

Southern Methodist University Cox School of Business

Over the past 15 years, SMU has worked with hundreds of organizations and positively impacted thousands of managers, directors, and executives as part of their corporate outreach to help companies address talent development issues. SMU, in collaboration with Dallas Area Rapid Transit (DART), created a program entitled Leadership DART.

The University, founded in 1911, has seven colleges with approximately 2000 faculty and staff and serves over 11,000 students from over 50 countries.

The following is a summary of the PET scores:

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	Southern Methodist University Cox School of Business				
3	Past Performance of Similar Work	84.80	25.00%	21.20	
4	Qualifications of Proposed Personnel	80.00	25.00%	20.00	
5	Consultant's proposed process and approach	95.70	30.00%	28.71	
6	Price	100.00	20.00%	20.00	
7	Total		100.00%	89.91	1

C. Cost/Price Analysis

The recommended price has been determined to be fair and reasonable based upon price analysis, technical evaluation, fact finding, historical cost, and negotiations. The negotiated amount reflects a reduction in the number of Engagement and Senior Executive Training sessions to an acceptable level without compromising program efficacy. Metro's Independent Cost Estimate (ICE) incorporated Engagement and Senior Executive Training sessions that were later deemed not critical to the program's success.

	Proposer Name	Proposal Amount	Metro ICE	Negotiated Amount
1.	Southern Methodist University Cox School of Business	\$2,632,966	\$1,974,074	\$858,552

D. Background on Recommended Contractor

The recommended firm, SMU, is located in Dallas, TX and has been in business for 107 years. SMU is a leader in the field of Executive Education and provides services in customer relationship and program execution functions and is staffed by proven business leaders with vast experience in adult learning and executive education. Prior engagements include: DART, Anadarko Petroleum, British Petroleum, Chesapeake Energy, Federal Express, Lockheed Martin, Shell, NBC Universal, and Toyota Manufacturing North America.

Proposed personnel are subject matter experts in executive education solutions across multiple industries.

In 2017 and 2018, SMU was selected to be the academic partner for the Metro Leadership Academy. In concert with the Senior Leadership Team and the Talent Development organization, SMU created and implemented a process for the Academy based on collaboration and adaptability that allows for ongoing innovation.