

## PROCUREMENT SUMMARY

## BICYCLE EDUCATION AND SAFETY TEAM (“BEST”) / PS67785000

1.	<b>Contract Number: Contract PS67785000</b>	
2.	<b>Recommended Vendor:</b> Estolano LeSar Perez Advisors (ELPA)	
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>	
	<b>A. Issued:</b> June 24, 2016	
	<b>B. Advertised/Publicized:</b> June 24, 2016	
	<b>C. Pre-proposal/Pre-Bid Conference:</b> July 6, 2016	
	<b>D. Proposals/Bids Due:</b> July 25, 2016	
	<b>E. Pre-Qualification Completed:</b> November 14, 2016	
	<b>F. Conflict of Interest Form Submitted to Ethics:</b> January 23, 2017	
	<b>G. Protest Period End Date:</b> <del>February 24</del> March 24, 2017	
5.	<b>Solicitations Picked up/Downloaded:</b> 10	<b>Bids/Proposals Received:</b> 1
6.	<b>Contract Administrator:</b> W. T. (Ted) Sparkuhl	<b>Telephone Number:</b> 213.922.7399
7.	<b>Project Manager:</b> Alice Tolar	<b>Telephone Number:</b> 213.922.2218

**A. Procurement Background**

This Board Action is to approve Contract No. PS66785000 to develop and conduct workshops for bicycle safety education, bicycle-specific traffic skills, and everyday bicycle transportation education. This Contract is for a three-year period of performance for professional services. Board approval of contract award is subject to resolution of any properly submitted protest.

Metro issued an initial Request for Proposal (RFP) No. PS17071, for this effort on April 27, 2016, expressly designated as a Small Business Set-Aside. It was posted on the Metro Vendor Portal, and advertised in three Los Angeles circulars. Staff conducted a pre-proposal conference; however, there were no attendees. No proposals were received in response to this RFP. A market survey was conducted with the Planholders of record to inquire as to why they did not propose. Firms responded that they lacked resources to prepare a proposal. However, one firm, Estolano LeSar Perez Advisors, indicated it was very interested in proposing, but was unable to meet the proposal deadline.

On June 24, 2016, the RFP was re-issued under RFP No. PS17071-2. This RFP was again posted to the Metro website open to all firms, and advertised in three Los Angeles circulars. Ten firms were identified as Planholders of record.

This RFP was issued as a competitive negotiated procurement in accordance with Metro’s Acquisition Policy. The contract type is firm fixed-price. This RFP was

issued with Small Business Enterprises/Disadvantaged Veteran Business Enterprise (SBE/DVBE) goals.

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

- Amendment No. 1, was issued on July 8, 2016, to provide copies of the pre-proposal attendees (sign-in sheets) list and a list of the Planholders of record.

A pre-proposal conference was held on July 6, 2016 and was attended by six people representing six firms. There were no questions received from the pre-proposal attendees or Planholders of record.

On July 25, one proposal was received. Staff ~~attempted to~~ conducted a market survey with the firms on the Planholders List as to why no other firm proposed. ~~However, staff did not receive any feedback from the firms on the Planholders list.~~ Five responses were received. One firm stated they were interested in the RFP; however the scope did not align with their services. Two firms stated they had a lack of resources available to propose. One firm is a subcontractor under the firm who submitted a proposal. One firm is a service company that helps businesses find public solicitations.

## **B. Evaluation of Proposal**

A Proposal Evaluation Team (PET) was assembled and consisted of three personnel from Metro's Active Transportation program office. The PET conducted a comprehensive technical evaluation of the proposal received.

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

- |   |     |
|---|-----|
| • Understanding of the Statement of Work & Approach | 40% |
| • Experience of Team Members                        | 30% |
| • Effectiveness of Project Management Plan          | 10% |
| • Price   | 20% |

The evaluation criteria are appropriate and consistent with criteria developed for similar professional services procurements. Several factors were considered when developing these weights, giving the greatest importance to the project understanding and approach.

On July 25, 2016, the proposal was distributed to the PET and was reviewed and evaluated. The PET conducted an interview with Estolano LeSar Perez Advisors (ELPA) and their subcontractors. ELPA's project manager and key subcontract members had an opportunity to present their qualifications and respond to the PET's questions. The presentation addressed the requirements of the RFP, perceived

project issues, commitment to schedule, and the project manager’s experience in managing similar programs to that being required by Metro.

Shortly after the interview, the PET met to finalize its scoring of the single proposer based upon ELPA’s interview presentation and responses to PET questions. As a result, the PET determined that ELPA was qualified to perform the contract requirements.

**Qualifications Summary of Recommended Firm:**

ELPA, a Metro certified Small Business, is well versed in bicycle safety education, leading community rides, and advocating on behalf of active transportation interests throughout the Los Angeles area. They have additional expertise in the design and implementation of urban cycling classes and training, which includes a diverse team of certified instructors with the ability to develop flexible curriculums as required. ELPA also has demonstrated a thorough understanding of Metro’s drive to create and maintain a sustainable economic development and urban revitalization by engaging and collaborating with the region’s diverse communities, deploying tailored community oriented bicycling events, and tracking metrics to assess effectiveness.

The founding members have built meaningful professional relationships in the areas of land use and environmental law and policy, transportation, planning, affordable housing, and workforce development. As the team lead, ELPA brings a wealth of experience leading multi-stakeholder processes as well as managing large teams to implement active transportation project throughout the region. ELPA’s team includes the Los Angeles County Bicycle Coalition (LACBC), BikeSGV, Multicultural Communities for Mobility, and Cyclist Inciting Change through LIVE Exchange (C.I.C.L.E.). These subcontractors are experts in bike safety and awareness, bike handling skills and ride development, cycling promotional events and bike and transit mobility training. ELPA’s proposal demonstrated a comprehensive understanding of Metro’s requirements and experience required for this project.

Following is a summary of the PET scores:

	<b>FIRM</b>	<b>Average Score</b>	<b>Factor Weight</b>	<b>Weighted Average Score</b>	<b>Rank</b>
<b>1</b>	Estolano LeSar Perez Advisors				
<b>2</b>	Understanding of Statement of Work and Approach	75.82	40.00%	30.33	
<b>3</b>	Experience of Team Members	75.57	30.00%	22.67	
<b>4</b>	Effectiveness of Project Management Plan	77.50	10.00%	7.75	
<b>5</b>	Cost Proposal	100.00	20.00%	20.00	

6	Total		100.00%	80.75	1
---	-------	--	---------	-------	---

### C. Cost Analysis

The recommended price for this project is determined to be fair and reasonable based on an independent cost estimate (ICE), a technical analysis, cost analysis, fact finding, and negotiations. The negotiated amount is a result of scope of work and level of effort clarifications.

The ICE included higher ranges for labor and overhead rates. Metro staff successfully negotiated a cost savings of \$58,774.58 from the firm's proposal.

Proposer Name	Proposal Amount	Metro ICE	Negotiated Price
Estolano LeSar Perez Advisors	\$2,366,775.59	\$2,402,231.00	\$2,308,001.01

### D. Background on Recommended Contractor

Estolano LeSar Perez Advisors, a Metro certified Small Business, is a partnership established in 2011 for the purpose of assisting clients in building better communities through strategic vision, guided by principle and tempered by pragmatism. They provide solutions to complex problems through their expertise in housing, workforce and economic development, sustainability, transportation, and community engagement. Their client base includes public agencies, foundations, business associations and other stakeholders that are looking to improve their communities.

They have led an interdisciplinary team charged with developing first/last mile access plans for Metro rail stations throughout the County. The firm has extensive experience managing large, interdisciplinary groups to achieve share outcomes including their engagement with the Goldhirsh Foundation's countywide LA2050 initiative. They have also worked with local governments and elected officials on issues of active transportation, where ELPA's role was Executive Director of the Westside Cities Council of Governments. ELPA has also led a consultant team charge with implementing six tactical urbanism events aided at promoting active transportation throughout the six county SCAG regions. Overall, key staff has more than 50 years of combined experience and has built meaningful professional relationships in multiple fields including bicycle education programs.