

PROCUREMENT SUMMARY

ELEVATOR AND ESCALATOR CONSULTING SERVICES / OP1107770008370

1.	Contract Number: OP1107770008370	
2.	Recommended Vendor: ATIS Elevator Inspections, LLC	
3.	Type of Procurement (check one): ☐ IFB ☒ RFP ☐ RFP-A&E ☐ Non-Competitive ☐ Modification ☐ Task Order	
4.	Procurement Dates:	
	A. Issued: October 26, 2023	
	B. Advertised/Publicized: October 26, 2023	
	C. Pre-Proposal Conference: November 6, 2023	
	D. Proposals Due: December 12, 2023	
	E. Pre-Qualification Completed: February 7, 2024	
	F. Ethics Declaration Forms Submitted to Ethics: December 12, 2023	
	G. Protest Period End Date: May 21, 2024	
5.	Solicitations Picked up/Downloaded: 14	Bids/Proposals Received: 3
6.	Contract Administrator: Manchi Yi	Telephone Number: (213) 418-3332
7.	Project Manager: Mark Jackson	Telephone Number: (213) 922-6788

A. Procurement Background

This Board Action is to approve Contract No. OP1107770008370 to provide regular and as-needed consulting services in support of Metro's existing systemwide elevator and escalator maintenance contract. Board approval of contract award is subject to the resolution of any properly submitted protest(s), if any.

On October 26, 2023, Request for Proposal (RFP) No. OP110777 was issued as a competitive procurement in accordance with Metro's Acquisition Policy and the contract type is a firm fixed unit rate. The Diversity and Economic Opportunity Department (DEOD) did not recommend a Small Business Enterprise/Disabled Veteran Business Enterprise (SBE/DVBE) participation goal for this procurement due to the lack of certified small business firms that can perform the required services.

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

A total of 14 firms downloaded the RFP and were included on the planholders' list. A virtual pre-proposal conference was held on November 6, 2023, with two participants representing one firm in attendance. There were no questions received for this RFP.

A total of three proposals were received by the due date of December 12, 2023, and are listed below in alphabetical order:

1. ATIS Elevator Inspections, LLC
2. Bureau Veritas - National Elevator Inspection Services, Inc.
3. Lerch Bates Inc.

B. Evaluation of Proposals

A Proposal Evaluation Team (PET) consisting of staff from Facilities Contracted Maintenance Services and Asset Management departments was convened and conducted a comprehensive technical evaluation of the proposals received.

The proposals were evaluated based on the following evaluation criteria:

Minimum Qualifications Pass/Fail Criteria: To be responsive to the RFP minimum qualification requirements, proposers must meet all of the following:

1. Proposer must have a minimum of three years of experience providing elevator/escalator monitoring and consulting services for at least three public or private entity clients with total combined billings of at least \$290,000 for each of the three years.
2. Proposer's project manager must have a minimum of three years of related skill and experience in performing elevator/escalator consulting services.
3. Proposer must assign a minimum of two Qualified Elevator Inspectors (QEI) certified by The American Society of Mechanical Engineers (ASME) to this project.

Weighted Evaluation Criteria: Proposers that met the Minimum Qualifications Pass/Fail Criteria were then evaluated based on the following weighted criteria:

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|---|-----|
| • Degree of the Proposer Skills and Experience | 25% |
| • Key Personnel | 20% |
| • Effectiveness of Management Plan, Understanding Work & Appropriateness of Approach for Implementation | 25% |
| • Price | 30% |

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

Evaluations were conducted from December 18, 2023, through January 29, 2024. The PET deemed all proposers responsive to the minimum qualifications pass/fail criteria and continued with the weighted evaluation.

The PET independently evaluated and scored the technical proposals and determined that ATIS Elevator Inspections, LLC (ATIS) was the highest-ranked proposer.

Qualifications Summary of Firms within the Competitive Range:

ATIS Elevator Inspections, LLC

ATIS, founded in 2012 is headquartered in St. Louis MO, and has construction experience with Canadian public transportation projects, and modernization and maintenance projects in California. The Project Manager has over 12 years of experience performing elevator/escalator consulting services, including new construction, modernizations, and preventive maintenance and repair. The ATIS' local team also includes two Qualified Elevator Inspectors (QEI) certified by the American Society of Mechanical Engineers (ASME). The Project Manager and one of ATIS local QEI experts have previously provided consulting services to Metro. ATIS uses a field data collecting and reporting software with a mobile data collection application that simplifies scheduling and reporting and allows client access via a portal and provides rapid access to results as well as transparency into the scheduling and inspection processes.

Bureau Veritas - National Elevator Inspection Services, Inc.

National Elevator Inspection Services, Inc. (NEIS), incorporated in 1965 and headquartered in St. Louis, MO, became part of the Building and Infrastructure division of Bureau Veritas (BV) North America in 2006. BV-NEIS is a world-wide organization that provides vertical transportation equipment quality assurance and control. Its key personnel are knowledgeable in all forms of vertical transportation equipment including elevators, escalators, dumbwaiters, material lifts, moving walks, and chair lifts. BV-NEIS uses a proprietary Work Order Management System (WOM) for operations management and internal quality assurance and quality control.

Lerch Bates Inc.

Lerch Bates, Inc., incorporated in 1974, is headquartered in Englewood, CO. It is an employee-owned international consulting firm that specializes in vertical transportation, building logistics, forensics, enclosures, and structures. Lerch Bates uses an elevator and escalator auditing tool for scheduling audits and email notifications.

Lerch Bates has been providing as-needed elevator/escalator consulting services to Metro since 1996 and performance has been satisfactory. It is well acquainted with the requirements of Metro including the vertical transportation equipment comprising the Metro portfolio.

The following is a summary of the PET scores:

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	ATIS Elevator Inspections, LLC				
3	Degree of the Proposer Skills and Experience	64.44	25.00%	16.11	
4	Key Personnel	73.35	20.00%	14.67	
5	Effectiveness of Management Plan, Understanding Work & Appropriateness of Approach for Implementation	64.44	25.00%	16.11	
6	Price	100.00	30.00%	30.00	
7	Total		100.00%	76.89	1
8	Bureau Veritas National Elevator Inspection Services, Inc.				
9	Degree of the Proposer Skills and Experience	73.32	25.00%	18.33	
10	Key Personnel	76.65	20.00%	15.33	
11	Effectiveness of Management Plan, Understanding Work & Appropriateness of Approach for Implementation	70.56	25.00%	17.64	
12	Price	81.63	30.00%	24.49	
13	Total		100.00%	75.79	2
14	Lerch Bates Inc.				
15	Degree of the Proposer Skills and Experience	72.24	25.00%	18.06	
16	Key Personnel	77.80	20.00%	15.56	
17	Effectiveness of Management Plan, Understanding Work & Appropriateness of Approach for Implementation	70.96	25.00%	17.74	
18	Price	78.33	30.00%	23.50	
19	Total		100.00%	74.86	3

C. Price Analysis

The recommended price has been determined to be fair and reasonable based on adequate competition, price analysis, an independent cost estimate (ICE), and technical analysis. It is 22.87% lower than Metro's ICE.

	Proposer Name	Proposal Amount	Metro ICE	Recommended Amount
1.	ATIS Elevator Inspections, LLC	\$1,792,050	\$2,323,278	\$1,792,050
2.	Bureau Veritas National Elevator Inspection Services, Inc.	\$2,195,275		
3.	Lerch Bates Inc.	\$2,287,482		

The variance between the ICE and the recommended amount is attributed to low overhead costs. The proposer is using field data collecting and reporting software with a mobile data collection app that simplifies scheduling and reporting and reduces QEI administrative duties and administrative staff overhead.

D. Background on Recommended Contractor

ATIS Elevator Inspections, LLC, founded in 2012 is headquartered in St. Louis MO. It is a full-service vertical transportation management company providing elevator management, inspection, and consulting services, including engineering and design. In 2023, ATIS merged with KJA an elevator engineering and design firm in Canada and Liberty Elevator Experts, a Delaware based elevator consulting firm which expanded the company's service offerings, capabilities and customer base. ATIS has 185 licensed qualified elevator inspectors and 85 experienced advisors spread across the US and Canada with a variety of unique and diverse elevator specialties.

ATIS currently oversees and manages more than 100 national portfolios, which account for more than 8,000 elevators. Its clients include City of Fairfax, State of Louisiana, State of Wisconsin and Hospitality Investors Trust.