

## PROCUREMENT SUMMARY

## STATE ACTIVE TRANSPORTATION PROGRAM / PS44597000

1.	<b>Contract Number:</b> PS44597000	
2.	<b>Recommended Vendor:</b> Evan Brooks Associates, Inc.	
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> August 3, 2017	
	<b>B. Advertised/Publicized:</b> August 3, 2017	
	<b>C. Pre-Proposal Conference:</b> August 15, 2017	
	<b>D. Proposals Due:</b> September 15, 2017	
	<b>E. Pre-Qualification Completed:</b> November 1, 2017	
	<b>F. Conflict of Interest Forms Submitted to Ethics:</b> October 25, 2017	
	<b>G. Protest Period End Date:</b> November 17, 2017	
5.	<b>Solicitations Picked up/Downloaded:</b> 23	<b>Bids/Proposals Received:</b> 3
6.	<b>Contract Administrator:</b> Brian Selwyn	<b>Telephone Number:</b> (213) 922-4679
7.	<b>Project Manager:</b> Shelly Quan	<b>Telephone Number:</b> (213) 922-3075

**A. Procurement Background**

This Board Action is to approve Contract No. PS44597000 issued in support of Metro's Countywide Planning Department which requires assistance in preparing new grant applications and revising or rewriting existing, previously submitted applications. Board approval of contract awards are subject to resolution of any properly submitted protest.

The Request for Proposal (RFP) was issued in accordance with Metro's Acquisition Policy and the contract type is firm fixed price. The RFP was issued as a Small Business Set-Aside and was only open to SBE certified firms.

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

- Amendment No. 1, issued on August 29, 2017, included a revised Scope of Services and revised Evaluation Criteria. The Scope of Services was revised to update the project milestone schedule. The Evaluation Criteria was revised to remove the Partnering with Small Business criterion that was not applicable.

A pre-proposal conference, held on August 15, 2017, was attended by seven participants representing six firms. There were 17 questions asked and responses were released prior to the proposal due date.

A total of 23 firms downloaded the RFP and were included in the planholder's list. A total of three proposals were received on September 15, 2017.

## **B. Evaluation of Proposals**

A Proposal Evaluation Team (PET) consisting of staff from Metro's Countywide Planning Department was convened and conducted a comprehensive technical evaluation of the proposals received.

The proposals were evaluated based on the following evaluation criteria and weights:

- |  |            |
|--|------------|
| • Quality of Consultant Proposal         | 45 percent |
| • Project Experience and Staff Available | 40 percent |
| • Price                                  | 15 percent |

Several factors were considered when developing these weights, giving the greatest importance to Quality of Consultant Proposal.

The three proposals received were determined to be within the competitive range and are listed below in alphabetical order:

1. Chen Ryan Associates, Inc. (CRA)
2. Estolano LeSar Perez Advisors (ELP)
3. Evan Brooks Associates, Inc. (EBA)

The PET members independently evaluated and scored the technical proposals from September 20, 2017 to October 16, 2017.

On October 16, 2017, the PET conducted interviews with the three firms. The firms had an opportunity to present their proposed project manager, the team's qualifications, and respond to the PET's questions. More specifically, the firms were asked to present a focused presentation describing their plans for carrying out the work specified in the subject Scope of Services.

The final scoring after interviews determined EBA to be the highest rated proposer.

### **Qualifications Summary of Firms within the Competitive Range:**

#### **Evan Brooks Associates, Inc. (EBA)**

EBA brings together grant writers, land use and transportation planners, sustainability experts, geographic information systems mapping specialists, greenhouse gas analysts, outreach facilitators, and urban graphic designers from the public, non-profit, and private sectors to focus on creating livable communities with mobility choices. Over nearly a decade, EBA has secured approximately \$133

million in local, regional, state, and federal grant funding for 44 cities and regional planning agencies in Los Angeles County. EBA has also prepared several active transportation plans for cities in Los Angeles County. EBA has worked in a grant-writing capacity with Metro as part of the 2016 grant assistance consultant team which prepared several successful applications to the programs included in the statement of work for this contract. In their proposal, EBA brings together the same firms who contributed in that endeavor, plus two additional firms to form a team with the direct experience and additional capacity needed to serve Metro's grant-writing needs. EBA and subcontractors Stantec Consulting Services, Inc., Deborah Murphy Urban Design + Planning and WSP will provide grant-writing and technical support services. Subcontractor Safe Routes to School National Partnership will provide quality assurance for grant applications.

### **Chen Ryan Associates, Inc. (CRA)**

CRA was established in November 2011 and provides a full service approach to transportation planning, operations, and design in Southern California. In the past few years, CRA has led several successful grant applications and secured funds in the fields of planning, design, and construction for Southern California local agencies through federal, state, and regional grants. For their proposal, CRA assembled firms that worked together as part of the 2015 Metro grant assistance effort and added two subcontractor firms. While the proposed team, as a whole, has experience with Metro and the programs included in the statement of work for this solicitation, CRA's work plan did not strongly communicate the team's readiness to take on all of the programs involved in this project in a timely manner.

### **Estolano LeSar Perez Advisors (ELP)**

ELP Advisors has expertise in housing, workforce and economic development, sustainability, transportation, and community engagement, with a focus on research and development in those areas. ELP has worked under contract with the Southern California Association of Governments and the California Strategic Growth Council to provide technical and grant writing assistance for applicants to the state Affordable Housing and Sustainable Communities Program. While the proposed team generally has experience with the programs delineated in the statement of work for this solicitation, given the current grant application deadlines, the team did not demonstrate sufficient direct experience or capacity to provide for the scale of Metro's grant assistance needs at this time.

Following is a summary of the PET evaluation scores:

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	<b>Evan Brooks Associates, Inc.</b>				
3	Quality of Consultant Proposal	84.44	45.00%	37.99	
4	Project Experience and Staff Available	80.83	40.00%	32.33	
5	Cost	97.27	15.00%	14.59	
6	<b>Total</b>		<b>100.00%</b>	<b>84.91</b>	<b>1</b>
7	<b>Chen Ryan Associates, Inc.</b>				
8	Quality of Consultant Proposal	78.89	45.00%	35.50	
9	Project Experience and Staff Available	88.33	40.00%	35.33	
10	Cost	73.80	15.00%	11.07	
11	<b>Total</b>		<b>100.00%</b>	<b>81.90</b>	<b>2</b>
12	<b>Estolano LeSar Perez Advisors</b>				
13	Quality of Consultant Proposal	81.11	45.00%	36.50	
14	Project Experience and Staff Available	75.00	40.00%	30.00	
15	Cost	100.00	15.00%	15.00	
16	<b>Total</b>		<b>100.00%</b>	<b>81.50</b>	<b>3</b>

### C. Cost Analysis

The recommended price has been determined to be fair and reasonable based upon an independent cost estimate (ICE), cost analysis, technical analysis, fact finding, and scope of services discussions.

	Proposer Name	Proposal Amount	Metro ICE	Negotiated Amount
1.	EBA	\$2,170,485.22	\$2,252,124.00	\$2,170,485.00
2.	ELP	\$2,110,715.56		
3.	Chen Ryan	\$2,858,885.50		

### D. Background on Recommended Contractor

The recommended firm, EBA, located in Pasadena has been in business for nearly a decade and has experience in the fields of grant writing and management solutions for public sector agencies. The team of EBA consists of subcontractors Stantec

Consulting Services Inc, Safe Routes to School National Partnership (SRTSNP), Deborah Murphy Urban Design + Planning (DMUDP), and WSP USA, Inc. (WSP). EBA's Project Manager (PM) has over 15 years of experience leading complex, multijurisdictional active transportation and grant projects. The PM has served on other Metro contracts including Metro's Rail to Rail/River Active Transportation Corridor Project Alternative Analysis – Segment B and as the EBA lead on the 2016 Metro grant assistance effort. The lead for Stantec has over 12 years of experience in urban planning, real estate strategy, and architecture and served as Deputy PM for the 2016 Metro grant assistance effort. The lead for DMUDP has over 20 years of experience in urban design/planning and grant preparation for public agencies, and had a 100 percent success rate for applications prepared through the 2016 Metro grant assistance effort. The WSP lead specializes in securing federal discretionary grant funds and developing funding strategy plans. The WSP lead has led preparation of applications to the federal FASTLANE grant program and worked with Metro on the financial plan for the Westside Purple Line Extension Section 3. The SRTSNP lead has over 20 years of experience in the nonprofit world writing, contributing to, and editing grant proposals and currently serves as the program and policy director for the Safe Routes to School National Partnership.

EBA, DMUDP and Stantec provided 2016 Metro grant assistance effort that successfully secured \$172.6 million in grant funding for Metro and local jurisdiction projects.