

PROCUREMENT SUMMARY

METRO LEADERSHIP ACADEMY / PS87481000

1.	Contract Number: PS87481000	
2.	Recommended Vendor: Southern Methodist University	
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 6, 2023	
	B. Advertised/Publicized: June 6, 2023	
	C. Pre-Proposal Conference: June 16, 2023	
	D. Proposals Due: July 11, 2023	
	E. Pre-Qualification Completed: September 14, 2023	
	F. Ethics Declarations Form Submitted to Ethics: July 11, 2023	
	G. Protest Period End Date: October 24, 2023	
5.	Solicitations Picked up/Downloaded: 22	Bids/Proposals Received: 1
6.	Contract Administrator: Manchi Yi	Telephone Number: (213) 418-3332
7.	Project Manager: Jose A. Ramirez	Telephone Number: (213) 418-3403

A. Procurement Background

This Board Action is to approve Contract No. PS87481000 in support of the development and implementation of Metro's Leadership Academy. Board approval of contract award is subject to resolution of all properly submitted protest(s).

Prior to the release of the solicitation, Metro conducted a virtual outreach event to inform the small business community of the upcoming opportunity, promote small business participation, and encourage competition. The outreach event was attended by 27 participants.

On June 6, 2023, Request for Proposal (RFP) No. PS87481 was issued as a competitive procurement in accordance with Metro's Acquisition Policy and the contract type is a firm fixed price. The Diversity & Economic Opportunity Department (DEOD) recommended a Disadvantaged Business Enterprise (DBE) goal of 5% for this procurement.

The solicitation was available for download from Metro's website and advertised to notify potential proposers of this solicitation, including several local University of California and Cal State University campuses, and other colleges and universities. Further, Metro notified potential proposers identified by the Project Office as well as firms from Metro's vendor database based on applicable North American Industry

Classification System (NAICS) codes.

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

- Amendment 1, issued on June 29, 2023, revised the scope of services and evaluation criteria to clarify the minimum qualification requirements and updated the submittal requirements to align with the changes to the scope of services and evaluation criteria.

A total of 22 firms downloaded the RFP and were included on the planholders list. A virtual pre-proposal conference was held on June 16, 2023, with two firms in attendance. Only one question was received, and Metro's response was released prior to the proposal due date.

On July 11, 2023, the proposal due date, a single proposal was received from Southern Methodist University (SMU).

Metro notified several colleges and universities, including local University of California and Cal State University campuses, of the release of the RFP. Metro staff canvassed the firms on the planholders' list to determine why there were no other proposals received. Reasons for declining to propose included not having the technical capabilities and choosing to pursue other opportunities outside of Metro. The market survey revealed that the decisions not to propose were based on individual business considerations. Therefore, the solicitation can be awarded as a competitive award.

B. Evaluation of Proposal

A Proposal Evaluation Team (PET) consisting of staff from Metro's Talent Development, Complete Streets & Highway Capital, Transportation Demand Management (TDM) Policy & Regional Shared Mobility departments was convened and conducted a comprehensive technical evaluation of the proposal received.

The proposal was evaluated based on the following evaluation criteria:

Phase 1 - Evaluation of Minimum Qualification Requirements: This is a pass/fail criteria. To be responsive to the RFP minimum qualification requirements, proposer must meet the following at the time of the proposal submittal:

- The prime contractor must be a regionally accredited college, university, or professional school. A regionally accredited college, university, or professional school is a U.S. institution that is accredited by a Council for

Higher Education Accreditation (CHEA) or U.S. Department of Education (DOED).

- Proposed facilitators of the Metro Leadership Program must be skilled and knowledgeable in their specialty with at least 5 years of experience in their specialty with a preference of 10+ years of relevant experience.

Phase II – Weighted Evaluation: Proposers that meet the Phase 1 Minimum Qualification requirements were evaluated based on the following evaluation criteria and weights:

- | | |
|-------------------------------------------------|-----|
| • Qualification and Experience of the Firm/Team | 25% |
| • Qualification of Proposed Key Personnel | 15% |
| • Work Plan Approach | 45% |
| • Cost Proposal | 15% |

The evaluation criteria are appropriate and consistent with criteria developed for other similar procurements. Several factors were considered in developing these weights, giving the greatest importance to the work plan approach.

The PET members independently evaluated and scored the technical proposal and determined that SMU met the requirements of the RFP and is technically qualified to perform the work.

The following is a summary of the PET scores:

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	Southern Methodist University				
3	Qualification and Experience of the Firm/Team	93.32	25%	23.33	
4	Qualification of Proposed Key Personnel	66.67	15%	10.00	
5	Work Plan Approach	80.84	45%	36.38	
6	Cost Proposal	100.00	15%	15.00	
7	Total		100%	84.71	1

C. Price Analysis

The recommended price has been determined to be fair and reasonable based upon technical analysis, price analysis using historical data, fact finding, and negotiations.

Proposer Name	Proposal Amount	Metro ICE	Recommended Amount
Southern Methodist University	\$1,806,350	\$1,506,030	\$1,748,350

The variance between the ICE and the recommended amount is because the ICE did not factor in the cost for additional leadership academy engagement training sessions and yearly escalation.

Staff successfully negotiated \$58,000 in cost savings from SMU's proposal.

D. Background on Recommended Contractor

The recommended firm, Southern Methodist University (SMU), located in Dallas, Texas, was founded in 1911. SMU has provided leadership development programs to the private and public sectors in the transportation, auto and healthcare industries. Existing clients include Toyota Manufacturing North America, Chevron USA Inc., Baylor Scott & White, and Dallas Area Rapid Transit.

Since 2017, SMU has developed and implemented Metro's Leadership Academy and performance has been satisfactory.