

PROCUREMENT SUMMARY

ELEVATOR AND ESCALATOR CONSULTING SERVICES / OP884190003367

1.	Contract Number: OP884190003367	
2.	Recommended Vendor: Lerch Bates, Inc.	
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: July 6, 2017	
	B. Advertised/Publicized: July 7, 2017	
	C. Pre-proposal/Pre-Bid Conference: July 19, 2017	
	D. Proposals/Bids Due: August 7, 2017	
	E. Pre-Qualification Completed: September 26, 2017	
	F. Conflict of Interest Form Submitted to Ethics: October 3, 2017	
	G. Protest Period End Date: November 20, 2017	
5.	Solicitations Picked up/Downloaded: 9	Bids/Proposals Received: 3
6.	Contract Administrator: Rommel Hilario	Telephone Number: (213) 922-4654
7.	Project Manager: Ronald White	Telephone Number: (213) 922-6737

A. Procurement Background

This Board Action is to approve a contract award to provide regular and as-needed consulting services in support of Metro's existing elevator/escalator maintenance contract as outlined in Request for Proposal (RFP) No. OP42511. Metro provides testing, inspections, routine maintenance, repair and improvement services through contracted services for 199 elevators and 148 escalators system wide. Board approval of contract awards are subject to resolution of any properly submitted protest.

The RFP was issued as a competitive negotiated procurement in accordance with Metro's Acquisition Policy. The contract type is firm fixed unit rate.

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

- Amendment No. 1, issued on July 20, 2017, provided pre-proposal documents including agenda, sign-in sheets, and planholder's list.

A pre-proposal conference was held on July 19, 2017. A total of three participants representing three firms were in attendance.

On August 7, 2017, Metro received three proposals as follows, in alphabetical order:

1. HKA Consulting Services, Inc.
2. Lerch Bates, Inc.
3. National Elevator Inspection Services

B. Evaluation of Proposals

The Proposal Evaluation Team (PET), consisting of staff from the Facility Maintenance and General Services departments reviewed proposals based on the technical criteria consistent with the qualifications, experience, and resources necessary to meet the requirements of the RFP. Each proposal addressed the firm’s degree of skills, personnel experience, understanding of the work, and cost/price to perform the work.

Proposals were evaluated in accordance with the criteria and weights established in the RFP and in compliance with Metro’s Acquisition Policy.

- Degree of the Consultants Team’s Skills and Experience 20%
- Effectiveness of Management Plan 25%
- Understanding of Work and Appropriateness of Approach for Implementation 15%
- Cost Proposal 40%

Several factors were considered in developing these weights, giving greatest importance to the cost proposal.

To clarify the requirements of the Statement of Work, Best and Final Offers (BAFO) were requested from each proposer and were subsequently evaluated by the PET.

The following is a summary of the PET’s evaluation scores:

1	FIRM	Average Score	Factor Weight	Weighted Average Score	Rank
2	Lerch Bates, Inc.				
3	Degree of the Consultants Team’s Skills & Experience	86.5	20%	17.3	
4	Effectiveness of Management Plan	80.0	25%	20.0	
5	Understanding of Work and Appropriateness of Approach for Implementation	74.7	15%	11.2	

6	Cost Proposal	89.0	40%	35.6	
7	Total		100.00%	84.1	1
8	National Elevator Inspection Services				
9	Degree of the Consultants Team's Skills & Experience	65.5	20%	13.1	
10	Effectiveness of Management Plan	62.4	25%	15.6	
11	Understanding of Work and Appropriateness of Approach for Implementation	48.7	15%	7.3	
12	Cost Proposal	100.0	40%	40.0	
13	Total		100.00%	76.0	2
14	HKA Consulting Services, Inc.				
15	Degree of the Consultants Team's Skills & Experience	65.5	20%	13.1	
16	Effectiveness of Management Plan	51.2	25%	12.8	
17	Understanding of Work and Appropriateness of Approach for Implementation	53.3	15%	8.0	
18	Cost Proposal	56	40%	22.4	
19	Total			56.3	3

C. Cost/Price Analysis

The recommended price has been determined to be fair and reasonable based upon adequate competition, price analysis, independent cost estimate, fact finding, and technical evaluation.

PROPOSER	AMOUNT	METRO ICE	AWARD AMOUNT
Lerch Bates, Inc. (incumbent)	\$1,502,651.00	\$1,558,276.29	\$1,502,651.00
National Elevator Inspection Services	\$1,330,619.00		
HKA Consulting, Inc.	\$2,393,075.69		

D. Background on Recommended Contractor

In 1947, Lerch Bates, Inc. became the first independent elevator consulting firm in the US. Since then, they have added offices and capabilities around the world, bringing industry expertise and technology together to work with clients. In 1986, Lerch Bates became an employee owned consulting firm.

Lerch Bates' experience in public transportation consulting covers some of the largest systems in North America and includes Washington Metropolitan Area Transit, Bay Area Rapid Transit, Massachusetts Bay Transportation Authority, Seattle Sound Transit, and New York City Transit. In addition to their public transportation consulting, Lerch Bates also provides vertical transportation consulting on some of the largest buildings around the world, such as the Burj Khalifa, Taipei 1010, Shanghai World Financial Center, Petronas Towers 1 and 2, the Empire State Building, and the Willis Tower. Lerch Bates also currently provides vertical transportation consulting for Metro and has performed satisfactorily.