

PROCUREMENT SUMMARY

ENERGY AND CLIMATE SERVICES
AE67484

1.	Contract Number: AE67484	
2.	Recommended Vendor: TRC	
3.	Type of Procurement (check one): <input type="checkbox"/> IFB <input type="checkbox"/> RFP <input checked="" type="checkbox"/> RFP-A&E <input type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order	
4.	Procurement Dates:	
	A. Issued: December 27, 2019	
	B. Advertised/Publicized: December 20, 2020	
	C. Pre-Proposal Conference: January 7, 2020	
	D. Proposals Due: March 3, 2020	
	E. Pre-Qualification Completed: September 19, 2020 (Prime)	
	F. Conflict of Interest Form Submitted to Ethics: September 3, 2020	
	G. Protest Period End Date: Est. November 23, 2020	
5.	Solicitations Picked up/Downloaded: 181	Proposals Received: 7
6.	Contract Administrator: Helen Gates-Bryant	Telephone Number: 213-922-1269
7.	Project Manager: Craig Reiter	Telephone Number: 213-418-3097

A. Procurement Background

This Board Action is to approve the award of Contract No. AE67484, issued in support of the Energy and Climate Services Project, providing support to Metro in its climate, energy, water and resources conservation and management program. These program areas support Metro's commitment to reduce, re-use, and recycle all internal resources and reduce greenhouse gas emissions. Board approval of contract award is subject to resolution of any properly submitted protest.

The RFP was issued in accordance with Metro's Acquisition Policy and California Government Code §4525-4525.9. The contract type is a Cost Reimbursable, specifically a Cost Plus Fixed Fee.

Six (6) amendments were issued during the solicitation phase of this RFP:

- Amendment No. 1, issued on January 3, 2020 changed the date and location of Pre-Proposal Conference
- Amendment No. 2, issued on January 8, 2020 added the required Form 60 in Excel Format
- Amendment No. 3, issued on January 10, 2020 clarified/revised solicitation documents (including submittal requirements and scope of services)
- Amendment No. 4, issued on January 31, 2020 changed the date proposals were due and acceptable **formats** for proposal submissions

- Amendment No. 5, issued on February 11, 2020 clarified/revised solicitation document (including submittal requirements)
- Amendment No. 6, issued on February 18, 2020 changed the date proposals were due

A total of seven (7) proposals were received on March 3, 2020. Metro held a pre-proposal conference on January 7, 2020, with a total of fifty-nine (59) people in attendance. Metro had representation from the Risk Management, Ethics, Pre-Qualification, Corporate Safety, Project Management and DEOD, to highlight the main elements of the RFP including the Disadvantaged Business Enterprise (DBE), Small Business Enterprise (SBE), and the Disabled Veteran Business Enterprise (DVBE) goal setting process for this multi-funding source, single award contract. Goals will be recommended based on scope of work and estimated dollar value for each task order, based on its federal and/or state/local funding. A total of seventy-eight (78) questions were received between the issuance of the solicitation and the RFP due date. All questions were addressed by three (3) separate Question and Answer memorandums and the Amendments listed above.

1. Anser Advisory Management, LLC dba Anser Advisory
2. ARUP North America, Ltd.
3. Burns & McDonald Engineering Co., Inc.
4. Guidehouse, Inc.
5. Morgner Construction Management
6. TRC Engineers, Inc. (CA)
7. Vanir Construction Management, Inc.

On March 20, 2020, Metro held Oral Presentations with the three (3) top ranked proposing firms, at which time Metro received three (3) sealed cost proposals that remained unopened until the recommended firm was approved by executive management in order to open their cost proposal only.

B. Evaluation of Proposals

A Proposal Evaluation Team (PET) consisting of staff from Environmental Compliance/Sustainability, and Construction Management, was convened and conducted a comprehensive technical evaluation of the proposals received.

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

- Degree of Skill and Experience 35 percent
- Understanding of Work and Appropriateness of Approach for Implementation 35 percent

- Effectiveness of Management Plan

30 percent

The evaluation criteria are appropriate and consistent with criteria developed for other, similar Architect and Engineers (A&E) procurements. Several factors were considered when developing these weights, giving the greatest importance to the skills and experience of key personnel, particularly the Project Manager's technical and managerial experience, and capabilities on similar projects and phases of work. The understanding and approach to implementing the work, with emphasis on maintaining schedule and budget in managing the three phases of the project.

This is an A&E, qualifications based procurement therefore, price cannot be used as an evaluation factor pursuant to state and federal law.

Of the seven (7) proposals received, the top three (3) ranked proposers were invited to make oral presentations. The three (3) firms are listed below in alphabetical order:

- 1, Anser Advisory Management, LLC dba Anser Advisory
- 2, Guidehouse, Inc.
- 3, TRC Engineers, Inc. (CA)

All appointed PET representatives reviewed a list of the Proposers and their subconsultants; none were aware of any actual or potential conflict of interest that may arise due to their participation in the evaluation of the Proposals, then completed and certified the Declaration of Confidentiality / No Conflict of Interest form.

During the oral presentations, in general, each team's presentation addressed the requirements of the RFP, experience with all aspects of the required tasks, and stressed each firm's commitment to the success of the project. Also highlighted were staffing plans, work plans, and perceived project issues. Each team was asked questions relative to each firm's proposed alternatives and previous experience.

The PET evaluated and scored the capabilities of each proposer and its team of subconsultants, in accordance with the Evaluation Criteria in the RFP Documents.

Qualifications Summary of Recommended Firm: The PET ranked the proposals and assessed major strengths, weaknesses and associated risks of each of the Proposers to determine the most qualified firm. The evaluation performed by the PET determined TRC, as the most qualified firm to provide Energy and Climate Services, as provided in the RFP Scope of Services. What distinguished TRC was they demonstrated, through their written proposal and oral presentation, their extensive experience performing Energy and Climate Services, including significant expertise in energy management and energy supply projects, climate adaptation and resilience projects, and strong transit energy project experience identified in the Scope of Services. TRC also demonstrated an exceptionally thorough and comprehensive understanding of managing multiple deliverables. The team is highly experienced in delivering similar projects with an excellent record in client

satisfaction on Metro projects Zero Emissions Bus (ZEB) Program Master Plan, Bill Reduction and Sustainability Strategies, Countywide Sustainability Reports & Performance Metrics, and similar projects throughout California.

Furthermore, the recommended team demonstrated that it is versed in providing the Scope of Services related to this contract, and has the capabilities to provide staffing for the type of work that is required under this contract. TRC exceeds the requirements of the three highest weighted criteria. It shows the Team is exceptionally thorough and has a comprehensive understanding of Metro's goals and methods, and resource allocation.

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	TRC				
3	Degree of Skill and Experience	88.17	35.00%	30.86	
4	Understanding of Work and Appropriateness of Approach for Implementation	91.80	35.00%	32.13	
5	Effectiveness of Management Plan	91.67	30.00%	27.50	
6	Total		100.00%	90.49	1
7	Guidehouse				
8	Degree of Skill and Experience	85.34	35.00%	29.87	
9	Understanding of Work and Appropriateness of Approach for Implementation	87.80	35.00%	30.73	
10	Effectiveness of Management Plan	86.10	30.00%	25.83	
11	Total		100.00%	86.43	2
12	Anser Advisory				
13	Degree of Skill and Experience	81.94	35.00%	28.68	
	Understanding of Work and Appropriateness of Approach for Implementation	88.37	35.00%	30.93	
14	Effectiveness of Management Plan	86.73	30.00%	26.02	
15	Total		100.00%	85.63	3

C. Cost Analysis

The recommended cost has been determined to be fair and reasonable based upon a cost analysis of labor rates, indirect rates and other direct costs completed in

accordance with Metro’s Procurement Policies and Procedures. The analysis includes, among other things, a comparison with similar firms; an analysis of rates and factors for labor, and other direct cost upon which the consultant will base its billings. Metro negotiated and established provisional indirect (overhead) rates, plus a fixed fee based on the total estimated cost for the contract term to compensate the consultant. Additionally, direct labor (level of effort) was reduced in several disciplines within the scope of services. This in turn reduced overhead costs, subconsultant costs and fixed fee for the prime and subconsultants.

Audits will be completed, where required, for those firms without a current applicable audit of their indirect cost rates, other factors, and exclusion of unallowable costs, in accordance with Federal Acquisition Regulation (FAR) Part 31. In order to prevent any unnecessary delay in contract award, provisional overhead rates have been established subject to Contract adjustments. In accordance with FTA Circular 4220.1 f, if an audit has been performed by any other cognizant agency within the last twelve month period, Metro will receive and accept that audit report for the above purpose rather than perform another audit.

Proposer Name	Proposal Amount	Metro ICE	Recommended NTE amount
TRC	N/A ⁽¹⁾	\$12,696,943.23 ⁽²⁾	\$7,618,166. ⁽³⁾

- (1) A proposal amount is not applicable as this is a Cost Plus Fixed Fee (CPFF) with no definable level of effort for the Scope of Services. Hourly labor rates, overhead and fee were negotiated and determined to be fair and reasonable.
- (2) Metro Independent Cost Estimate (ICE) is for the three year base contract plus two one-year options
- (3) The amount of \$7,618,166.00 is V/CM's extraction from the Independent Cost Estimate (ICE) for the three-year base contract period

D. Background on Recommended Contractor

The recommended firm, TRC, located Irvine, California, is a national leader in the delivery of energy and climate consulting services with direct, relevant experience in energy advisory services, technical and engineering services, and sustainability planning. TRC’s experience includes climate adaptation and resilience, building energy management, and air quality and greenhouse gas monitoring/mitigation which are important elements within the scope of this contract.

TRC has assembled a team with relevant expertise capable of supporting Metro across multiple task orders simultaneously without jeopardizing quality, or on-schedule delivery of projects. The TRC team has successfully worked hand-in-hand with Metro’s Environmental Compliance and Sustainability Departments for more than eight years. The multidisciplinary team includes 23 subconsultants that have a vast knowledge and experience with Metro, including work on the Metro Red and Gold Line Flywheel Assessments, Blue Line Testing and Integration, Metro Regional Connector Transit Corridor Project, and Systemwide electric, gas and water validation projects.

The Project Director has 29 years of project and program management experience in government and utility industries supporting energy, sustainability, and environmental strategic planning efforts. For the last four years, the Director's priority has been their management role on Metro's Energy Management Program. The Project Director's commitment to this project will be 100% availability. The availability of additional Leads and Managers on the team is between 100% to 75%.