



Metro

Los Angeles County
Metropolitan Transportation Authority

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**PLANNING AND PROGRAMMING COMMITTEE
MARCH 19, 2014**

SUBJECT: COUNTYWIDE PLANNING RESEARCH SERVICES BENCH

ACTION: AWARD CONTRACTS

RECOMMENDATION

Award seven Contract Agreements under the Countywide Planning Research Services Bench (RFIQ) No. PS4540-3200 with the contractors recommended in Attachment A-1 for a three-year period with two one-year options beginning May 1, 2014 for professional services not-to-exceed a cumulative total value of \$2 million.

ISSUE

Countywide Planning requires transportation planning survey research services inclusive of Station Intercept and/or On-Board Surveys, Telephone Interview Surveys, Focus Group Sessions and Online Survey Panel disciplines. These services are for monitoring a variety of on-going customer satisfaction and program awareness efforts. These efforts include assisting in the planning and operation of multi-modal transportation projects and programs including transit services, corridor planning and improvements, station and facility designs, bicycle planning, rail and busway projects, long-range planning and policy, land use, grants management, community/public outreach, and pedestrian and bikeway facilities. Many of the projects and studies listed in the Bench contract categories are small/mid-scale that, once identified, must be initiated and completed in a relatively short period of time. The Countywide Planning Research Services Bench will allow task orders to be awarded more efficiently since the initial qualification reviews have been completed.

DISCUSSION

The current Market Research Bench No. PS7140-2313 has been utilized over the past 5 years and has proven to be a very successful method in reducing staff resources expended on the procurement of service contracts and has allowed for projects to be completed in a more efficient manner. The authorized cumulative amount under the current Bench, which expires on April 30, 2014, is \$2 million.

Over the past five years, Survey Research needs have evolved with some disciplines no longer needed due to the Communications Department moving to Countywide Planning and the separation of Countywide Planning and the Highway Programs Planning Departments. Further, new disciplines have been identified due to Measure R

Planning and the separation of Countywide Planning and the Highway Programs Planning Departments. Further, new disciplines have been identified due to Measure R and new responsibilities such as Systemwide Planning, Union Station Master Planning, Vanpool services, etc., being undertaken by Countywide Planning. Disciplines included in the existing Bench were evaluated and updated to reflect the evolving needs of the Department.

DETERMINATION OF SAFETY IMPACT

The approval of this procurement will not have any impact on the safety of our customers and employees.

FINANCIAL IMPACT

This is a renewal of the current bench and is not an award of contract. There is no financial impact at this time. As projects are identified, funding will also be identified. Each task order awarded to a Contractor will be funded with the source of funds identified for that project. Since this is a multi-year contract, the cost center manager and Chief Planning Officer will be responsible for budgeting costs in future years, including any options exercised.

Impact to Budget

The funding for these task orders is dependent upon the specific project. Generally, Propositions A and C, Measure R and Transportation Development Act (TDA) Administration funds used for planning activities which are not eligible for bus or rail capital and operating, will be used.

ALTERNATIVES CONSIDERED

The Board could choose not to approve the recommendations. This is not recommended as the award of these task orders would then be pursued as separate procurements which, for each task order, could potentially take up to six months to complete. Each procurement would invest comparatively large amounts of staff time in internal processes, and would make it difficult to complete the research conducted on an annual basis within the planned timeframe. This would also limit our ability to respond quickly to needs and to meet tight schedule constraints.

NEXT STEPS

Upon Board approval, we will notify successful proposers and establish the Bench contracts. As needed, we will solicit responses to individual task orders from specific disciplines. DBE and/or SBE requirements will be set for each task order.

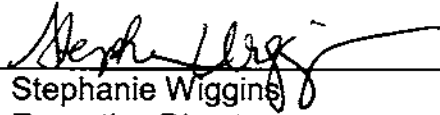
ATTACHMENTS

- A. Procurement Summary
- A-1. Recommended Firms by Discipline

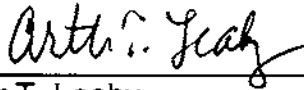
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PROCUREMENT SUMMARY

COUNTYWIDE PLANNING RESEARCH SERVICES BENCH

1.	Contract Number: PS4540-3200- XX-XX (Research Services Contracts and task orders will be identified by sequential numbers)	
2.	Recommended Vendor: 7 Contractors (see Attachment A-1)	
3.	Type of Procurement (check one): <input type="checkbox"/> IFB <input type="checkbox"/> RFP <input type="checkbox"/> RFP-A&E <input type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input checked="" type="checkbox"/> Task order	
4.	Procurement Dates:	
	A. Issued: December 3, 2013	
	B. Advertised/Publicized: Advertised in the following publications: Asian Week (12/3/13); Southwest Wave (12/3/13); Los Angeles Daily News (12/3/13); LA Opinion (12/3/13)	
	C. Pre-Proposal/Pre-Bid Conference: December 12, 2013	
	D. Proposals/Bids Due: January 6, 2014	
	E. Pre-Qualification Completed: January 28, 2014	
	F. Conflict of Interest Form Submitted to Ethics: February 4, 2014	
	G. Protest Period End Date: March 26, 2014	
5.	Solicitations Picked up/Downloaded: 51	Bids/Proposals Received: 7
6.	Contract Administrator: Anthony J. Comres	Telephone Number: (213) 922-1039
7.	Project Manager: Jeff Boberg	Telephone Number: (213) 922-7659

A. Procurement Background

This Board Action is for a Task Order Bench Contract procurement issued in support of the Countywide Planning (CP) Department to establish Bench contracts of qualified subject matter experts in four disciplines. These disciplines include Station Intercept and/or On-Board Surveys, Telephone Interview Surveys, Focus Group Sessions and Online Survey Panels.

The Request for Information and Qualifications (RFIQ) was issued in accordance with Metro's Acquisition Policy and Procedure and the contract type will be Firm Fixed Price based on the statements of work.

Two amendments were issued during the solicitation phase of this RFIQ as follows:

- Amendment No. 1, issued on December 17, 2013, provided clarification of the Statement of Qualifications and responses to questions received at the Pre-Proposal Conference.
- Amendment No. 2, issued on December 26, 2013, provided clarification on licensing not being a requirement.

Individual task orders issued under the Bench Contract will be issued to all qualified Contractors within a specific discipline and will be awarded based on the best qualified proposer responding to the specific scope of work. Award will be made to the highest rated proposer with price being a consideration. All task orders awarded will be in compliance with Small and Disadvantaged Business requirements.

B. Evaluation of Proposals

A total of seven (7) proposals were received on January 6, 2014 covering four (4) disciplines. A Source Selection Committee was established for all disciplines consisting of staff from the Countywide Planning department. Each Committee member conducted an independent, comprehensive technical evaluation of the proposals received for each of the disciplines.

The proposals were evaluated based on the following evaluation criteria:

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|--|-----|
| 1. Firm's Qualifications and Availability | 50% |
| 2. Project Manager and Key Staff's Qualifications and Availability | 30% |
| 3. Effective Scheduling/Cost Monitoring Plan | 20% |

The evaluation criteria are appropriate and consistent with criteria developed for similar services Bench procurements. The intent of the Bench is to have a pool of qualified contractor's pre-qualified/pre-screened in one or more disciplines that will compete for task orders. Placement on the Bench will not guarantee an award of any task order.

Evaluation committee meetings were held for each discipline throughout the month of January 2014. The Evaluation committee members deemed interviews were not necessary.

Of the seven proposals received, all proposals were determined to be within the competitive range and are listed in Attachment A-1. Of the seven proposals, three firms are identified as certified SBE or DBE primes. One firm identified as a prime is a certified DBE, the other two firms are certified SBE primes.

Qualifications Summary of Firms Within the Competitive Range:

Beacon Management Group (BMG)

BMG founded in 1997 operating out of Pasadena, California, is a 16-year-old certified local SBE/MBE/DBE management consulting firm that specializes in strategy and evaluation, marketing, and organizational development.

BMG has credentials for providing services for research projects, management solutions, deploying focus groups, interviews and survey methodologies and public policy recommendations for government and public agencies.

BMG has worked with the Southern California Public Power Authority (SCPPA), Caltrans, LA Housing Department and the Los Angeles Department of Water and Power. BMG has worked on several Metro projects and has performed satisfactorily.

EMC Research, Inc. (EMC)

EMC founded in 1989, has offices in Oakland, Seattle, and Columbus, serving a broad base of clients across the country and around the world. EMC is a full service research opinion and strategic consulting firm serving a broad range of public and private sector clients.

EMC's experience includes on-board intercept surveys, rider satisfaction surveys, focus group studies and market segmentation studies. EMC's clients include Puget Sound Regional Transit Agency, Bay Area Rapid Transit, MARTA in Atlanta, and Alameda County Transportation Improvement Authority. EMC has no previous contracts with Metro.

Fairbank, Maslin, Maullin, Metz & Associates (FM3)

FM3 is based in Santa Monica, California, and specializes in public policy-oriented opinion research since the company was first organized in 1981. The firm is experienced in conducting research for government jurisdictions, corporations, private, and non-profit organizations to support the planning, development, implementation, and evaluation of media campaigns, and public policy programs.

FM3's projects include the Los Angeles County Water Quality Measure Survey, the Southern California Association of Government Congestion Pricing Survey and Metro's Market Research Bench. FM3 has performed satisfactorily.

Moore & Associates, Inc. (M&A)

Moore & Associates, Inc. founded in 1991, is located in Valencia, California, and has been providing professional transportation specific market research consulting services for nearly 25 years.

M&A has provided services to several transportation agencies including Metro, Metrolink, Foothill Transit, Monterey-Salinas Transit and Tri Delta Transit. Moore & Associates, Inc. has performed satisfactorily.

Noble Insight (NI)

Noble Insight is located in Decatur, Georgia, and is a 12 year old certified DBE management consulting firm that provides services for quantitative and qualitative analysis for research projects, management solutions, and public policy recommendations for the private and public sectors.

NI has worked nationally with United Parcel Service (UPS), Proctor & Gamble, Nabisco, Georgia State Road and Tollway Authority, Florida Department of Transportation, Virginia Department of Transportation and Metro. Noble Insight has

performed satisfactorily.

NUSTATS Research Solutions (NUSTATS)

NUSTATS Research Solutions is located in Austin, Texas, and has nearly 30 years in the transit-focused and travel behavior research business. NUSTATS has conducted transit surveys in nearly every major metropolitan area in the United States. NUSTATS has successfully managed studies involving language barriers, transit agency operational overlap (multi-agency, multi-modal services), hard to reach rider populations and high peak-demand transit systems.

Some of NUSTATS' customers include Caltrans, Southeast Michigan Council of Government Transit, Broward County Transit, Denver Regional Transit District and Metro. NUSTATS has performed satisfactorily.

Redhill Group, Inc. (RGI)

Redhill Group, Inc. is located in Irvine, California, and is in the field of transportation research. Over the past 20 years, RGI has conducted over 150 transportation research projects for transportation providers and metropolitan planning organizations.

RGI offers extensive experience in public transit and some of their customers include Metro, Bay Area Rapid Transit (BART), Washington Metropolitan Area Transit Authority, Orange County Transportation Authority (OCTA), and Metrolink. RGI has performed satisfactorily.

C. Cost/Price Analysis

The RFIQ contained neither price nor a specific Statement of Work. Each future RFP/task order will contain a specific Statement of Work which will be competed with the qualified firms within the discipline. The Bench contractors will propose according to the requirements in the task order and a cost/price analysis will be performed, as appropriate, on task orders issued.

D. Background on Recommended Contractor

Refer to Attachment A-1, Recommended Firms by Discipline for background on recommended contractors.

E. Small Business Participation

The Diversity & Economic Opportunity Department (DEOD) has established a 20% Race Conscious Disadvantaged Business Enterprise (DBE) goal and a 20% Small Business Enterprise (SBE) goal for the Countywide Planning Research Services Bench. Proposers were encouraged to form teams that included DBE and SBE firms without schedules or specific dollar commitments prior to the establishment of the Bench. DBE and SBE commitments will be determined on the aggregate of all

Task Orders issued. Participants on the Bench will be required to meet the RC DBE contract-specific goal by obtaining enough RC DBE participation to meet the goal or by successfully demonstrating Good Faith Efforts. The SBE Preference Program will apply to all non-federally funded Task Orders.

SMALL BUSINESS GOAL	20% DBE	SMALL BUSINESS COMMITMENT	20% DBE
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DBE Firms	DBE Commitment %
Noble Insight (DBE Prime)	20.00%
1. Noble Insight	
2. The Robert Group	
Beacon Management Group (DBE Prime)	20.00%
1. Beacon Management Group	
EMC Research, Inc.	20.00%
1. T.E.M.P.S., Inc.	
Fairbank, Maslin, Maullin, Metz & Associates	20.00%
1. Kandi Reyes & Associates	
2. LW Research Grove	
Moore & Associates, Inc.	20.00%
1. Everfield Consulting, LLC	
Nustats Research Solutions	20.00%
1. Maroon Society, Inc.	
Redhill Group, Inc.	20.00%
1. Arellano Associates	
2. JLM Staffing	

SMALL BUSINESS GOAL	20% SBE	SMALL BUSINESS COMMITMENT	20% SBE
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SBE Firms	SBE Commitment %
Noble Insight (SBE Prime)	20.00%
1. Noble Insight	
2. The Robert Group	
Beacon Management Group (SBE Prime)	20.00%
1. Beacon Management Group	
EMC Research, Inc.	20.00%
1. T.E.M.P.S., Inc.	
Fairbank, Maslin, Maullin, Metz & Associates	20.00%
1. Kandi Reyes & Associates	
Moore & Associates, Inc.	20.00%
1. Everfield Consulting, LLC	
Nustats Research Solutions	20.00%
1. Maroon Society, Inc.	
Redhill Group, Inc. (SBE Prime)	20.00%
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2. Arellano Associates	
3. JLM Staffing	