

**Board Report**

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**File #:** 2017-0535, **File Type:** Contract**Agenda Number:** 22.

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**PLANNING AND PROGRAMMING COMMITTEE  
SEPTEMBER 20, 2017****SUBJECT: METRO RIDESHARE/SHARED MOBILITY PROGRAM SUPPORT****ACTION: APPROVE RECOMMENDATION****RECOMMENDATION**

AUTHORIZE the Chief Executive Officer to award firm fixed price Contract No. PS42183000 to Innovative TDM Solutions, Inc. (ITS), for a three-year base term in the amount of \$1,767,263.93, with two, one-year options, each in the amount of \$596,590.88, for a total value of \$2,960,445.69 for **Metro Rideshare/Shared Mobility Program Support** services in Los Angeles County, subject to resolution of protest(s), if any.

**ISSUE**

Since the 1980's, Metro has provided funding and ridesharing/shared mobility assistance through a variety of approaches to Los Angeles County employers and commuters. In 2014, Metro's Shared Mobility and Implementation department entered into a TRI-Regional County Transportation Commissions (CTC) Partnership with the Orange County Transportation Authority (OCTA) and Ventura County Transportation Commission (VCTC). The main focus of this collaborative effort is to provide systematic tri-regional ridesharing/shared mobility assistance to drive-alone commuters and to employer Employee Transportation Coordinators (ETC) as a way to meet air quality regulations and/or implement congestion management strategies by offering, promoting and encouraging their employees to participate in a variety of green trip options, such as transit, carpooling, vanpooling, biking and walking.

In addition, Metro's Shared Mobility and Implementation team oversees auxiliary related programs, such as ETC follow-up compliance training classes, personalized South Coast Air Quality Management District (SCAQMD) Rule 2202 Employee Commute Reduction Program (ECRP) assistance and Trip Reduction Plan (TRP) support, which includes SiSense training (data management and reporting), Average Vehicle Ridership (AVR) surveying and reporting, and the production and distribution of customized RideGuides.

We also encourage and promote Commuter Benefits, flex/tiered work schedules, employer-based transit and vanpool subsidies, incentive/rewards programs, Guaranteed Ride Home (GRH), Metro Rewards and a Go Metro to Work Free for One Week program for new hires.

Also, within our scope of operation, we conduct semi-annual Rideshare/Shared Mobility certification workshops, facilitate regional awards/recognition ceremonies (California Rideshare Week/ETC Diamond Awards), produce the ridesharing/shared mobility "On The Go" newsletter(s), foster regional publicity through the support of "on-air" traffic reporters, assist with outreach activities and work collaboratively with Transportation Management Associations/Organizations (TMA/Os) and the SCAQMD.

Any and all of these services are available to both Rule 2202-regulated employers and employers under local city compliance ordinances. Non-regulated employers and general public commuters may also use our services. The Rideshare/Shared Mobility Program is also part of the Metro's Long Range Transportation Plan to assist the region in reducing traffic congestion and improving air quality.

## **DISCUSSION**

Managing congestion-reduction strategies and air quality compliance regulations is complex and requires a solid knowledge base and strong industry specific relationships. Metro relies on a highly-trained and dedicated contractor to assist with and provide our required broad range of services. The current contract for this service and support function is set to expire October 1, 2017. This new Contract will allow Metro's Shared Mobility and Implementation unit the ability to continue to provide our exceptional rideshare/shared mobility services to Los Angeles County Employer ETCs, non-regulated employers and to individual non-represented commuters.

The recommended contractor will be responsible for several primary tasks and deliverables. While the statement of work (SOW) outlines the responsibilities in comprehensive detail, the following summarizes the related duties: RidePro-RP35 and SiSense Program Software and database maintenance, ECRP; process AVR transportation survey and reporting; TRP support and RideGuide processing and distribution; respond to in/outbound calls, emails and online inquires; incentive program eligibility and fulfillment; personalized support to commuters; one-on-one training and support to employer ETCs and TMA/Os; organize and provide assistance at county rideshare/shared mobility events; and support overall program growth initiatives, as well as conduct monthly ETC briefings training.

The recommended contractor is trained in RidePro-RP35 and SiSense and will oversee the Los Angeles County portion of the regional database, which will ensure a standardized rideshare/shared mobility operating system with OCTA and VCTC. This customized proprietary software product provided by Trapeze Software Group (TripSpark), Inc. is under a separate contract. All CTC partners have participated in the design and build-out of the TRI-Regional ridesharing/share mobility database and reporting system.

## **DETERMINATION OF SAFETY IMPACT**

The Board action will not have a negative impact on the safety of Metro's patrons or employees. One can maintain that with fewer single occupancy vehicles on the roadways, the safer the commute is for everyone travelling throughout the region via transit, carpooling, vanpooling, biking and walking. The

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Metro Rideshare/Shared Mobility Program has demonstrated effectiveness in reducing the number of cars on the road during the peak commute period, which contributes to public safety. Currently, Metro provides support to over 230,000 commuters and over 700 (and growing) Los Angeles worksites regulated by SCAQMD Rule 2202 and local Transportation Demand Management city ordinances.

### **FINANCIAL IMPACT**

The FY18 budget includes \$1.2 million for professional services in Cost Center 4540, Shared Mobility and Implementation, Project 405547, Rideshare Services. The project manager will be accountable for managing costs during the term of this contract. Since this is a multi-year contract, the cost center manager and the Chief Planning Officer will be responsible for budgeting the cost in future years.

#### **Impact to Budget**

The source of funds for this action is Proposition C 25% Streets and Highway, which is not eligible to fund bus and rail operating and capital expenditures.

### **ALTERNATIVES CONSIDERED**

The Board can choose not to authorize the CEO to award this Contract. Staff does not recommend this option because services will lapse and Metro will no longer be able to provide support to 700+ worksites regulated by SCAQMD's Rule 2202 and/or local city ordinances in Los Angeles County and ride matching services to 230,000 commuters. Incentive programs would terminate and countywide support of rideshare services would end. Critical support programs that employer ETCs are dependent on, such as the ECRP and TRP, which include annual surveying and AVR reporting, would also cease and cause undue hardship on regulated employers throughout the Los Angeles region. Employers not submitting their ECRP TRP on an annual basis and on time may be subject to a fine imposed by the SCAQMD.

Moreover, Metro is the holder of a license agreement with Trapeze Software Group, Inc. for the use of RidePro in partnership with the OCTA and VCTC, and without the continuation of this work, Metro would not have the capability to immediately provide staff resources to continue using RidePro and would lose the financial investment in this database. The impact to the regional partners would be significant, since Los Angeles County participants are 72% of the database and the maintenance of this database information would lapse.

### **NEXT STEPS**

Upon Board approval, staff will execute Contract No. PS42183000 with Innovative TDM Solutions for Metro Rideshare/Shared Mobility Program Support services.

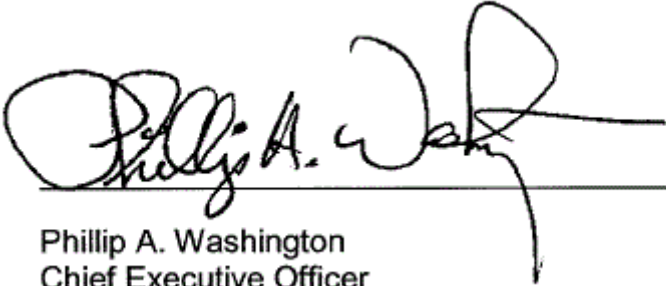
**ATTACHMENTS**

Attachment A - Procurement Summary

Attachment B - DEOD Summary

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Phillip A. Washington  
Chief Executive Officer

## PROCUREMENT SUMMARY

**METRO RIDESHARE/SHARED MOBILITY PROGRAM SUPPORT  
PS42183000**

1.	<b>Contract Number:</b> PS42183000	
2.	<b>Recommended Vendor:</b> Innovative TDM Solutions	
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> June 1, 2017	
	<b>B. Advertised/Publicized:</b> June 1, 2017	
	<b>C. Pre-Proposal Conference:</b> June 15, 2017	
	<b>D. Proposals Due:</b> July 3, 2017	
	<b>E. Pre-Qualification Completed:</b> August 24, 2017	
	<b>F. Conflict of Interest Form Submitted to Ethics:</b> August 7, 2017	
	<b>G. Protest Period End Date:</b> September 19, 2017	
5.	<b>Solicitations Picked up/Downloaded:</b> 75	<b>Bids/Proposals Received:</b> 2
6.	<b>Contract Administrator:</b> Gina Romo	<b>Telephone Number:</b> (213) 922-7558
7.	<b>Project Manager:</b> Martin Buford	<b>Telephone Number:</b> (213) 922-2601

**A. Procurement Background**

This Board Action is to approve Contract No. PS42183000 issued in support of the rideshare/shared mobility program which assists Los Angeles County based Transportation Management Association and Organization and Employee Transportation Coordinators, of participating employers, to manage and comply with the South Coast Air Quality Management District (SCAQMD) Rule 2202, On-Road Mitigation Options. 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 a firm fixed price. The RFP was issued with a Small Business Enterprise (SBE) goal of 12 percent and a Disabled Veteran Business Enterprise (DVBE) goal of 3 percent.

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

- Amendment No. 1, issued on June 23, 2017, clarified ridematching activities and disbursement of information to schools were not required and were removed from the Statement of Work and further clarified the requirement to provide personalized bilingual (English/Spanish) customer services assistance Monday through Friday by telephone, email or online and was added to the Statement of Work.

A total of 75 firms downloaded the RFP and were included in the planholder's list. A total of two proposals were received on July 3, 2017.

A pre-proposal conference was held on June 15, 2017, and was attended by 11 participants representing 10 firms. There were 37 questions asked and responses were released prior to the proposal due date.

## **B. Evaluation of Proposals**

A Proposal Evaluation Team (PET) consisting of staff from Metro Countywide Planning Department and Ventura County Transportation Demand 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:

- Transportation Demand Management (TDM) Rideshare/ Shared Mobility Related Qualifications 30 percent
- Experience, Staffing and Project Coordination 25 percent
- Work Plan 25 percent
- Price 20 percent

The evaluation criteria are appropriate and consistent with criteria developed for other, similar TDM services. Several factors were considered when developing these weights, giving the greatest importance to TDM Rideshare/Shared Mobility Related Qualifications.

Both proposals received were determined to be within the competitive range. The two firms are listed below in alphabetical order:

1. Innovative TDM Solutions
2. Steer Davies Gleave

The PET members independently evaluated and scored the technical proposals from July 7, 2017 through July 14, 2017. Based on the proposals, the PET unanimously agreed that interviews were not necessary due to the regulatory and administrative requirements of this program and the clearly defined proposals showing each firm's area of expertise and specific skillsets.

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

### **Innovative TDM Solutions**

Innovative TDM Solutions (ITS), formerly known as Inland Transportation Services, is a small Transportation Demand Management (TDM) firm. ITS has staff who are bilingual, SCAQMD certified Employee Transportation Coordinators (ETCs), and assisted in the creation of the Average Vehicle Ridership software program utilized by over 700 employers in Los Angeles, Orange and Ventura Counties. ITS has been successfully providing Metro with rideshare/shared mobility program support for the past 12 years. ITS has staff members assigned full time to the project running surveys, providing training to ETCs, assisting employers with rideshare/shared mobility programs, providing outreach and education, and growing the program through additional participating employers and rideshare/shared mobility users. The Van Stratten Group, the SBE subcontractor, will be the on-site trainer and provide outreach. Bayfish Creative Management, the DVBE subcontractor, will conduct marketing presentations, create new employer output reports analyzing data in a visual context, assist with growing social media and digital marketing strategies.

### **Steer Davies Gleave**

Steer Davies Gleave (SDG) is focused on the planning and development of transportation programs to reduce single occupant trips and mileage through the use of sustainable alternatives. SDG developed the Transit Master Plan for Sacramento's Regional Transit District and has recently completed the Orange County Complete Streets Initiative. SDG has been managing the Glendale TDM program and has worked closely with the Go Verdugo program consisting of Transportation Management Associations in Glendale, Burbank and Pasadena. SDG is working with the City of Santa Monica on a Transportation Management Organization and to promote Metro's Expo Line extension into Santa Monica. SDG's background in developing TDMs and new program ideologies does not specifically address Metro's need or the requirements of the RFP. Metro's program is well established and has the sustaining power of over 700 employer clients. Metro needs a firm to manage the administrative and regulatory requirements of the program. SDG did not demonstrate adequate experience managing a rideshare program the size and breadth of Metro's.

Following is a summary of the PET evaluation scores:

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	<b>Innovative TDM Solutions</b>				
3	TDM Rideshare/Shared Mobility Qualifications	87.00	30.00%	26.10	
4	Experience, Staffing and Project Coordination	65.00	25.00%	16.25	
5	Work Plan	67.50	25.00%	16.88	
6	Price	100.00	20.00%	20.00	
7	<b>Total</b>		<b>100.00%</b>	<b>79.23</b>	<b>1</b>
8	<b>Steer Davies Gleave</b>				
9	TDM Rideshare/Shared Mobility Qualifications	66.00	30.00%	19.80	
10	Experience, Staffing and Project Coordination	55.00	25.00%	13.75	
11	Work Plan	52.50	25.00%	13.13	
12	Price	75.00	20.00%	15.00	
13	<b>Total</b>		<b>100.00%</b>	<b>61.68</b>	<b>2</b>

### C. Price Analysis

The recommended price has been determined to be fair and reasonable based upon adequate price competition, an independent cost estimate (ICE), price analysis, technical analysis, fact finding, and negotiations. Metro successfully negotiated a cost savings of \$277,501 primarily due to reductions in the overhead rate and profit.

	Proposer Name	Proposal Amount	Metro ICE	Negotiated Amount
1.	Innovative TDM Solutions	\$3,237,947.08	<b>3,442,497.89</b>	<b>\$2,960,445.69</b>
2.	Steer Davies Gleave	\$4,333,348.28	<b>3,442,497.89</b>	

### D. Background on Recommended Contractor

The recommended firm, Innovative TDM Solutions (ITS), located in Riverside, CA has been in business for 28 years in the field of Transportation Demand Management and is a leader in TDM. ITS, formerly known as Inland Transportation Services, is the incumbent contractor for the Metro Rideshare/Shared Mobility



Program Support and has provided Metro with these services for the past 12 years. The proposed team is comprised of staff from ITS and two subcontractors, one is SBE certified and the other is DVBE certified. Cumulatively, the team has over 100 years of experience in TDM. The President and founder of ITS has served as the Project Manager for Metro's rideshare program since 2005 and has received 17 local, regional, and national industry awards. The proposed on-site supervisor has 23 years of experience in the TDM industry, including 12 consecutive years working with the Metro Rideshare Program Support project. SBE subcontractor, The Van Stratten Group, has over 37 years of experience in TDM. Bayfish Creative Management, the DVBE subcontractor, has 19 years of experience providing marketing related support.

ITS is the incumbent provider for these services, and their services have been satisfactory.

## DEOD SUMMARY

**METRO RIDESHARE/SHARED MOBILITY PROGRAM SUPPORT  
PS42183000**

**A. Small Business Participation**

The Diversity and Economic Opportunity Department (DEOD) established a 15% goal, inclusive of a 12% Small Business Enterprise (SBE) and 3% Disabled Veteran Business Enterprise (DVBE) goal for this solicitation. Innovative TDM Solutions exceeded the goal by making a 13.21% SBE and 3.65% DVBE commitment.

<b>Small Business Goal</b>	<b>12% SBE 3% DVBE</b>	<b>Small Business Commitment</b>	<b>13.21% SBE 3.65% DVBE</b>
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<b>SBE Subcontractors</b>		<b>% Committed</b>
1.	The Van Stratten Group, Inc.	13.21%
<b>Total Commitment</b>		<b>13.21%</b>

<b>DVBE Subcontractors</b>		<b>% Committed</b>
1.	Bayfish Creative Management	3.65%
<b>Total Commitment</b>		<b>3.65%</b>

**B. Living Wage and Service Contract Worker Retention Policy Applicability**

The Living Wage and Service Contract Worker Retention Policy is not applicable to this Contract.

**C. Prevailing Wage Applicability**

Prevailing wage is not applicable to this Contract.

**D. Project Labor Agreement/Construction Careers Policy**

Project Labor Agreement/Construction Careers Policy is not applicable to this Contract.