



## Board Report

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**File #:** 2024-0082, **File Type:** Contract**Agenda Number:** 20.

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**OPERATIONS, SAFETY, AND CUSTOMER EXPERIENCE COMMITTEE  
MAY 16, 2024****SUBJECT: ELEVATOR AND ESCALATOR CONSULTING SERVICES****ACTION: APPROVE CONTRACT AWARD****RECOMMENDATION**

AUTHORIZE the Chief Executive Officer to award a firm fixed unit rate Contract No. OP1107770008370 to ATIS Elevator Inspections, LLC (ATIS) to provide regular and as-needed elevator and escalator consulting services systemwide, in the not-to-exceed (NTE) amount of \$1,015,470 for the three-year base period, \$390,590 for option year one, and \$385,990 for option year two, for a total combined NTE amount of \$1,792,050, effective July 1, 2024, subject to resolution of any properly submitted protest(s), if any.

**ISSUE**

The existing elevator and escalator consulting services contract expires on June 30, 2024. To avoid a lapse in service and continue providing safe, quality, regularly scheduled, and as-needed elevator and escalator consulting services, a new contract award is required, effective July 1, 2024.

**BACKGROUND**

On November 16, 2017, the Board of Directors awarded a firm fixed unit rate Contract No. OP884190003367 to Lerch Bates, Inc. to provide comprehensive elevator and escalator consulting services systemwide, effective January 1, 2018. Under the existing contract, the consultant is required to perform annual equipment audits and as-needed technical condition assessments on each of the existing 218 elevators and 163 escalators for a total of 381 units systemwide.

**DISCUSSION**

During the new contract period of performance, the scope of services will expand to include an additional 159 units, comprised of 78 elevators and 81 escalators, for an updated total unit count of 540 systemwide. The additional units are part of Metro's system expansion projects, which require plan submittal reviews and the initial acceptance inspections prior to the start of the one year warranty and maintenance period, per the following:

- Regional Connector: 15 elevators and 12 escalators

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- Airport Metro Connector (AMC): 11 elevators and 10 escalators
  - A Line (Blue) Foothill Extension Phase 2B: 10 elevators
  - D Line (Purple) Extension Phase I: 12 elevators and 18 escalators
  - D Line (Purple) Extension Phase II: Eight (8) elevators and 12 escalators
  - G Line (Orange) Grade Separation: Eight (8) elevators and eight (8) escalators
  - D Line (Purple) Extension Phase III: 14 elevators and 21 escalators

This contract is critical to Metro's operations to minimize equipment downtime, maintain reliability and service availability, and ensure the provision of safe equipment operation for Metro employees and patrons. Additionally, this contract requires the consultant to closely monitor the maintenance contractor's performance by conducting annual audits of all units and recommending repairs in a timely manner. These annual performance audits and critical required reporting can only be performed by highly trained and certified professionals within the vertical transportation industry to verify proper equipment operation and ensure equipment conditions conform to the latest codes, regulations, and standards governing vertical transportation equipment.

The scope of services for the new contract recommended for award also supports new construction project activities requiring the consultant to perform as-needed services for reviewing and commenting on drawings, preparing technical specifications for new equipment additions, upgrades, and/or modifications, and conducting acceptance inspections of newly installed elevators and escalators. These actions are necessary to ensure compliance with Metro project specifications, American Public Transportation Association (APTA) guidelines, and State code requirements.

The new contract amount is 18% above the existing contract amount and 23% below the Independent Cost Estimate (ICE). Based on the significantly expanded scope of services to support the 42% increase in the number of units included under the new contract as part of the system expansion projects, the new contract amount recommended for award is considered fair and reasonable.

### **DETERMINATION OF SAFETY IMPACT**

The approval of this item will ensure meeting Metro maintenance standards by providing the necessary technical expertise to ensure compliance with product specifications, State code requirements, and sustaining a high level of equipment availability, while ensuring the delivery of safe, on-time, and reliable access to Metro employees and patrons.

### **FINANCIAL IMPACT**

Funding of \$38,029.39 for elevator and escalator consulting services for the remainder of FY24 is allocated under cost center 8370 - Facilities Contracted Maintenance Services, account 50308, Service Contract Maintenance, under various projects.

Since this is a multi-year contract, the cost center manager and Deputy Chief Operations Officer, Shared Mobility will be accountable for budgeting the cost in future years.

### **Impact to Budget**

The current source of funds for this action includes operating eligible sales tax funding including Passenger Fares, Propositions A/C, Measures R/M, STA, and the Transportation Development Act. These fund sources are eligible for bus and rail operations. Use of these funding sources leverages maximum project fund use given approved guidelines and provisions.

### **EQUITY PLATFORM**

Comprehensive elevator and escalator consulting services are critical to Metro's operations to ensure high levels of equipment availability with minimal downtime and impact to riders. The elevators and escalators throughout Metro's transit system play a vital role in riders' access, especially for patrons with mobility-impairments.

Metro customers, staff, and Transit Ambassadors, including those with Limited English Proficiency (LEP), can report vandalism, cleanliness, and maintenance issues through the Customer Relations numbers posted throughout Metro bus and rail facilities. Customers have the option of communicating with Metro through nine different languages using translation services. Metro also ensures translated signage is posted for systemwide elevators and escalators reported vandalized and/or out of service. On a monthly basis, Metro receives and responds to an average of 165 reports of vandalism, cleanliness, and maintenance issues. The response time is usually within 24 hours unless there are major mechanical issues requiring additional parts and materials with long lead times.

The Diversity and Economic Opportunity Department (DEOD) did not recommend a Small/Disabled Veteran Business Enterprise (SBE/DVBE) participation goal for this Procurement due to lack of availability of certified firms able to perform the required technical expertise.

### **IMPLEMENTATION OF STRATEGIC PLAN GOALS**

This Board action supports Strategic Goal 1: Provide high-quality mobility options that enable people to spend less time traveling, and Strategic Goal 2: Deliver outstanding trip experiences for all users of the transportation system. Specifically, the elevator and escalator consulting contract ensures equipment operation and compliance with the latest codes, regulations, and standards governing vertical transportation equipment.

### **ALTERNATIVES CONSIDERED**

The Board may elect not to approve the recommendations. This option is not recommended as it would result in a gap in service significantly impacting Metro's system safety, operations, accessibility, and customer experience.

With the completion of a financial-based insourcing/outourcing study based on a quantitative and qualitative assessment, Staff has analyzed insourcing/outourcing options for elevator and escalator consulting services among other services. Based on the findings, elevator and escalator consulting services were not recommended for insourcing as this is a highly technical service requiring the

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hiring and training of Certified Qualified Elevator Inspectors (QEI) and the purchase of additional equipment, vehicles, and supplies to support service delivery.

### **NEXT STEPS**

Upon approval by the Board, staff will execute Contract No. OP1107770008370 with ATIS to provide regular and as-needed elevator and escalator consulting services systemwide effective July 1, 2024.

### **ATTACHMENTS**

Attachment A - Procurement Summary

Attachment B - DEOD Summary

Prepared by:

Lena Babayan, Executive Officer, Operations Administration (Interim), (213) 922-6765

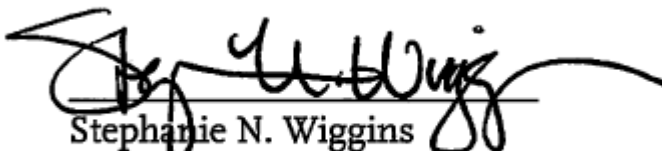
Carlos Martinez, Director, Facilities Contracted Maintenance Services, (213) 922-6761

Shahrzad Amiri, Deputy Chief Operations Officer, Shared Mobility, (213) 922-3061

Carolina Coppolo, Deputy Chief Vendor/Contract Management Officer (Interim), (213) 922-4471

Reviewed by:

Conan Cheung, Chief Operations Officer, Transit Operations,  
(213) 418-3034



Stephanie N. Wiggins  
Chief Executive Officer

## PROCUREMENT SUMMARY

## ELEVATOR AND ESCALATOR CONSULTING SERVICES / OP1107770008370

|    |   |  |
|----|---|--|
| 1. | <b>Contract Number:</b> OP1107770008370   |  |
| 2. | <b>Recommended Vendor:</b> ATIS Elevator Inspections, LLC   |  |
| 3. | <b>Type of Procurement (check one):</b> <input type="checkbox"/> IFB <input checked="" type="checkbox"/> RFP <input type="checkbox"/> RFP-A&E<br><input type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order |  |
| 4. | <b>Procurement Dates:</b>   |  |
|    | <b>A. Issued:</b> October 26, 2023  |  |
|    | <b>B. Advertised/Publicized:</b> October 26, 2023   |  |
|    | <b>C. Pre-Proposal Conference:</b> November 6, 2023   |  |
|    | <b>D. Proposals Due:</b> December 12, 2023  |  |
|    | <b>E. Pre-Qualification Completed:</b> February 7, 2024   |  |
|    | <b>F. Ethics Declaration Forms Submitted to Ethics:</b> December 12, 2023   |  |
|    | <b>G. Protest Period End Date:</b> May 21, 2024   |  |
| 5. | <b>Solicitations Picked up/Downloaded:</b><br><br>14  | <b>Bids/Proposals Received:</b><br><br>3   |
| 6. | <b>Contract Administrator:</b><br>Manchi Yi   | <b>Telephone Number:</b><br>(213) 418-3332 |
| 7. | <b>Project Manager:</b><br>Mark Jackson   | <b>Telephone Number:</b><br>(213) 922-6788 |

**A. Procurement Background**

This Board Action is to approve Contract No. OP1107770008370 to provide regular and as-needed consulting services in support of Metro's existing systemwide elevator and escalator maintenance contract. Board approval of contract award is subject to the resolution of any properly submitted protest(s), if any.

On October 26, 2023, Request for Proposal (RFP) No. OP110777 was issued as a competitive procurement in accordance with Metro's Acquisition Policy and the contract type is a firm fixed unit rate. The Diversity and Economic Opportunity Department (DEOD) did not recommend a Small Business Enterprise/Disabled Veteran Business Enterprise (SBE/DVBE) participation goal for this procurement due to the lack of certified small business firms that can perform the required services.

No amendments were issued during the solicitation phase of this RFP.

A total of 14 firms downloaded the RFP and were included on the planholders' list. A virtual pre-proposal conference was held on November 6, 2023, with two participants representing one firm in attendance. There were no questions received for this RFP.

A total of three proposals were received by the due date of December 12, 2023, and are listed below in alphabetical order:

1. ATIS Elevator Inspections, LLC
2. Bureau Veritas - National Elevator Inspection Services, Inc.
3. Lerch Bates Inc.

## **B. Evaluation of Proposals**

A Proposal Evaluation Team (PET) consisting of staff from Facilities Contracted Maintenance Services and Asset Management departments was convened and conducted a comprehensive technical evaluation of the proposals received.

The proposals were evaluated based on the following evaluation criteria:

Minimum Qualifications Pass/Fail Criteria: To be responsive to the RFP minimum qualification requirements, proposers must meet all of the following:

1. Proposer must have a minimum of three years of experience providing elevator/escalator monitoring and consulting services for at least three public or private entity clients with total combined billings of at least \$290,000 for each of the three years.
2. Proposer's project manager must have a minimum of three years of related skill and experience in performing elevator/escalator consulting services.
3. Proposer must assign a minimum of two Qualified Elevator Inspectors (QEI) certified by The American Society of Mechanical Engineers (ASME) to this project.

Weighted Evaluation Criteria: Proposers that met the Minimum Qualifications Pass/Fail Criteria were then evaluated based on the following weighted criteria:

- |   |     |
|---|-----|
| • Degree of the Proposer Skills and Experience  | 25% |
| • Key Personnel   | 20% |
| • Effectiveness of Management Plan, Understanding Work & Appropriateness of Approach for Implementation | 25% |
| • Price   | 30% |

The evaluation criteria are appropriate and consistent with criteria developed for similar procurements. Several factors were considered when developing these weights, giving the greatest importance to price.

Evaluations were conducted from December 18, 2023, through January 29, 2024. The PET deemed all proposers responsive to the minimum qualifications pass/fail criteria and continued with the weighted evaluation.

The PET independently evaluated and scored the technical proposals and determined that ATIS Elevator Inspections, LLC (ATIS) was the highest-ranked proposer.

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

#### **ATIS Elevator Inspections, LLC**

ATIS, founded in 2012 is headquartered in St. Louis MO, and has construction experience with Canadian public transportation projects, and modernization and maintenance projects in California. The Project Manager has over 12 years of experience performing elevator/escalator consulting services, including new construction, modernizations, and preventive maintenance and repair. The ATIS' local team also includes two Qualified Elevator Inspectors (QEI) certified by the American Society of Mechanical Engineers (ASME). The Project Manager and one of ATIS local QEI experts have previously provided consulting services to Metro. ATIS uses a field data collecting and reporting software with a mobile data collection application that simplifies scheduling and reporting and allows client access via a portal and provides rapid access to results as well as transparency into the scheduling and inspection processes.

#### **Bureau Veritas - National Elevator Inspection Services, Inc.**

National Elevator Inspection Services, Inc. (NEIS), incorporated in 1965 and headquartered in St. Louis, MO, became part of the Building and Infrastructure division of Bureau Veritas (BV) North America in 2006. BV-NEIS is a world-wide organization that provides vertical transportation equipment quality assurance and control. Its key personnel are knowledgeable in all forms of vertical transportation equipment including elevators, escalators, dumbwaiters, material lifts, moving walks, and chair lifts. BV-NEIS uses a proprietary Work Order Management System (WOM) for operations management and internal quality assurance and quality control.

#### **Lerch Bates Inc.**

Lerch Bates, Inc., incorporated in 1974, is headquartered in Englewood, CO. It is an employee-owned international consulting firm that specializes in vertical transportation, building logistics, forensics, enclosures, and structures. Lerch Bates uses an elevator and escalator auditing tool for scheduling audits and email notifications.

Lerch Bates has been providing as-needed elevator/escalator consulting services to Metro since 1996 and performance has been satisfactory. It is well acquainted with the requirements of Metro including the vertical transportation equipment comprising the Metro portfolio.

The following is a summary of the PET scores:

| 1  | Firm  | Average Score | Factor Weight  | Weighted Average Score | Rank     |
|----|---|---------------|----------------|------------------------|----------|
| 2  | <b>ATIS Elevator Inspections, LLC</b>   |               |                |                        |          |
| 3  | Degree of the Proposer Skills and Experience  | 64.44         | 25.00%         | 16.11                  |          |
| 4  | Key Personnel   | 73.35         | 20.00%         | 14.67                  |          |
| 5  | Effectiveness of Management Plan, Understanding Work & Appropriateness of Approach for Implementation | 64.44         | 25.00%         | 16.11                  |          |
| 6  | Price   | 100.00        | 30.00%         | 30.00                  |          |
| 7  | <b>Total</b>  |               | <b>100.00%</b> | <b>76.89</b>           | <b>1</b> |
| 8  | <b>Bureau Veritas National Elevator Inspection Services, Inc.</b>                                     |               |                |                        |          |
| 9  | Degree of the Proposer Skills and Experience  | 73.32         | 25.00%         | 18.33                  |          |
| 10 | Key Personnel   | 76.65         | 20.00%         | 15.33                  |          |
| 11 | Effectiveness of Management Plan, Understanding Work & Appropriateness of Approach for Implementation | 70.56         | 25.00%         | 17.64                  |          |
| 12 | Price   | 81.63         | 30.00%         | 24.49                  |          |
| 13 | <b>Total</b>  |               | <b>100.00%</b> | <b>75.79</b>           | <b>2</b> |
| 14 | <b>Lerch Bates Inc.</b>   |               |                |                        |          |
| 15 | Degree of the Proposer Skills and Experience  | 72.24         | 25.00%         | 18.06                  |          |
| 16 | Key Personnel   | 77.80         | 20.00%         | 15.56                  |          |
| 17 | Effectiveness of Management Plan, Understanding Work & Appropriateness of Approach for Implementation | 70.96         | 25.00%         | 17.74                  |          |
| 18 | Price   | 78.33         | 30.00%         | 23.50                  |          |
| 19 | <b>Total</b>  |               | <b>100.00%</b> | <b>74.86</b>           | <b>3</b> |

### C. Price Analysis

The recommended price has been determined to be fair and reasonable based on adequate competition, price analysis, an independent cost estimate (ICE), and technical analysis. It is 22.87% lower than Metro's ICE.



|    | <b>Proposer Name</b>                                       | <b>Proposal Amount</b> | <b>Metro ICE</b> | <b>Recommended Amount</b> |
|----|--|------------------------|------------------|---------------------------|
| 1. | ATIS Elevator Inspections, LLC                             | \$1,792,050            | \$2,323,278      | \$1,792,050               |
| 2. | Bureau Veritas National Elevator Inspection Services, Inc. | \$2,195,275            |                  |                           |
| 3. | Lerch Bates Inc.   | \$2,287,482            |                  |                           |

The variance between the ICE and the recommended amount is attributed to low overhead costs. The proposer is using field data collecting and reporting software with a mobile data collection app that simplifies scheduling and reporting and reduces QEI administrative duties and administrative staff overhead.

#### **D. Background on Recommended Contractor**

ATIS Elevator Inspections, LLC, founded in 2012 is headquartered in St. Louis MO. It is a full-service vertical transportation management company providing elevator management, inspection, and consulting services, including engineering and design. In 2023, ATIS merged with KJA an elevator engineering and design firm in Canada and Liberty Elevator Experts, a Delaware based elevator consulting firm which expanded the company's service offerings, capabilities and customer base. ATIS has 185 licensed qualified elevator inspectors and 85 experienced advisors spread across the US and Canada with a variety of unique and diverse elevator specialties.

ATIS currently oversees and manages more than 100 national portfolios, which account for more than 8,000 elevators. Its clients include City of Fairfax, State of Louisiana, State of Wisconsin and Hospitality Investors Trust.

**DEOD SUMMARY**

**ELEVATOR AND ESCALATOR CONSULTING SERVICES/ OP1107770008370**

**A. Small Business Participation**

The Diversity and Economic Opportunity Department (DEOD) did not recommend a Small Business Enterprise (SBE)/Disabled Veteran Business Enterprise (DVBE) participation goal for this procurement due to the lack of availability of small businesses. It is expected that ATIS Elevator Inspections, LLC will perform the services of this contract with its own workforce.

**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 requirements are applicable to this project. DEOD will monitor contractors' compliance with the State of California Department of Industrial Relations (DIR), California Labor Code, and, if federally funded, the U S Department of Labor (DOL) Davis Bacon and Related Acts (DBRA).

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

Project Labor Agreement/Construction Careers Policy is not applicable to this Contract. Project Labor Agreement/Construction Careers Policy is applicable only to construction contracts that have a construction contract value in excess of \$2.5 million.