

**Metropolitan Transportation Commission  
Administration Committee**

**December 14, 2022**

**Agenda Item 3a**

**Contract – Regional Zero Emission Transit Transition Strategy: Sam Schwartz Consulting, LLC (\$544,500)**

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**Subject:**

A request for Committee approval to negotiate and enter into a contract with Sam Schwartz Consulting, LLC, in an amount not to exceed \$544,500 for the Regional Zero Emission Transit Transition Strategy.

**Background:**

Among Bay Area transit operators, a large-scale transition from traditional fueling sources to zero-emission transit is underway. Operators are responding to regulations including the California Air Resources Board (CARB)'s Innovative Clean Transit Rule, which requires bus operators to convert their fleets to zero-emission over the coming decades, CARB's newly adopted Advanced Clean Cars II Regulation, which will impact the region's smaller transit vehicles, and proposed amendments to CARB's Commercial Harbor Craft regulation, which will require emissions reductions to ferryboat fleets.

Individual transit operators are planning their zero-emission fleets, associated charging and fueling infrastructure, workforce development and training, and other elements related to this transition. MTC, in partnership with the region's operators, is implementing a Regional Zero Emission Transit Transition Strategy to serve as a regional lens on the transition of the region's public transit systems to zero emission. The strategy is intended to help coordinate and serve as a resource for operators to meet the challenge of the CARB rules, find multi-agency efficiencies, navigate the relationship with energy providers, develop plans to fund the transition, and put into a larger context how this significant region-wide transition of buses and ferries to zero-emission, and the associated need for charging infrastructure, is nested within a broader transition to electrification and zero-emission in the building and vehicle sectors.

Based on input from the Bay Area Partnership Board and in coordination with the transit operators, staff is recommending securing consultant services to develop the Regional Zero Emission Transit Transition Strategy. The consultant services include expertise in zero emission vehicle transitions and associated charging/fueling infrastructure.

Principles for this strategy are to:

- Transition in partnership among transit operators, county transportation agencies, local jurisdictions, Metropolitan Transportation Commission (MTC), the state, and the federal government
- Develop regional, subregional, corridor, and agency specific funding proposals to fund elements of the transition
- Explore coordinated and shared technologies facilities, including regional, subregional, corridor, and infrastructure hub options
- Support a dynamic bus and ferry system that serves local routes, key trunk corridors, and the express lane network
- Provide an overview of key issues to consider in the near and longer-term related to technology decisions and charging needs, roles of power providers, cities and counties in managing capacity of bus operators and other segments of power users with the goal of helping in decision-making.
- Evaluate and manage risk throughout the transition

### **Consultant Selection Process and Recommendation**

On October 3, 2022, MTC issued a request for interest to the firms prequalified on the 2021 Regional Planning bench under the Transportation Policy and Implementation service category. On October 18, 2022 MTC invited interested firms to submit a proposal for evaluation in determining a Direct Select recommendation. Three proposals were received, from Arup US, Inc. (“Arup”), Sam Schwartz Consulting, LLC (“Sam Schwartz”), and Steer Davies & Gleave, Inc. (“Steer”).

A panel of MTC, San Francisco Municipal Transportation Agency, and Golden Gate Bridge, Highway, and Transportation District staff evaluated the proposals based on the following criteria:

- Staffing and management experience and expertise in areas relevant to Request for Proposals
- Proposed approach – has consultant built a practical and innovative approach
- Relative strength of Cost Proposal

Based on its evaluation, the panel recommends the team led by Sam Schwartz. Sam Schwartz had the following strengths that led to the panel's recommendation:

- Management team with strong direct experience leading zero-emission transit transition plans and strategies throughout California and the United States, including both very large and small operators
- Project team with strong direct experience across the spectrum of zero-emission transition considerations, including through subconsultants Kimley-Horn (utilities and zero-emission infrastructure focuses), Niti Systems (hydrogen fuel cell infrastructure, fleet and procurement, ferry electrification and workforce training and development focuses), and TY Lin (funding opportunities, fleet and procurement, hydrogen fuel cell, and infrastructure focuses).
- Strong understanding of project scope and practical workplan to accomplish it, including navigation of the complex factors inherent to the Bay Area's transit system
- Competitive cost proposal

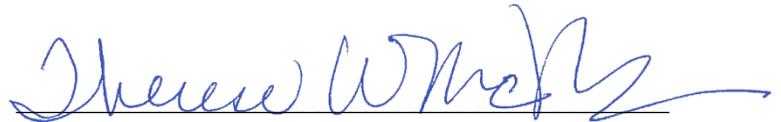
Sam Schwartz's proposal included one Disadvantaged Business Enterprise (DBE) subconsultant performing around 22% of the work in total. Attachment A includes a summary of Sam Schwartz and their subconsultants' small business and DBE status related to the work described in this memorandum.

**Recommendation**

Staff recommends that the Committee authorize the Executive Director to negotiate and enter into a contract with Sam Schwartz in an amount not to exceed \$544,500 for the term of January 3, 2023, through January 31, 2024, with an option to extend for up to an additional two years, to conduct the Regional Zero Emission Transit Transition Strategy.

**Attachments:**

- Attachment A: Disadvantaged Business Enterprise and Small Business Enterprise Status
- Attachment B: Request for Committee Approval – Summary of Proposed Contract



Therese W. McMillan

Attachment A

**Disadvantaged Business Enterprise and Small Business Enterprise Status**

**Regional Zero Emission Transit Transition Strategy**

	<b>Firm Name</b>	<b>Role on Project</b>	<b>DBE* Yes / No</b>	<b>If DBE Yes, List #</b>	<b>SBE** Yes / No</b>	<b>If SBE Yes, List #</b>
Prime Contractor	Sam Schwartz	Lead	No		No	
Subcontractor	Kimley-Horn and Associates	Subconsultant	No		No	
Subcontractor	Niti Systems	Subconsultant	Yes	47874	Yes	8453
Subcontractor	TYLin International	Subconsultant	No		No	

\*Denotes certification by the California Unified Certification Program (CUCP).

\*\*Denotes certification by the State of California.

Note: As a federally funded project, the SBE program does not apply. As such, no SBE goal was set.

**Request for Committee Approval**

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**Summary of Proposed Contract**

Work Item No.:	1512
Consultant:	Sam Schwartz Consulting, LLC Oakland, CA
Work Project Title:	Regional Zero-Emission Transit Transition Strategy
Purpose of Project:	Perform analysis and provide a summary that will assist MTC, in partnership with the region's transit operators, to coordinate and serve as a resource as operators transition to a Zero Emission Transit fleet.
Brief Scope of Work:	The Sam Schwartz team will provide a summary and analysis of operators' transition plans across the region and associated expenses and technological needs, identify multi-agency efficiencies and opportunities for collaboration, provide a broader overview of short and longer-term issues to consider in the transition of buses and other sector to electrification and zero-emission technologies and infrastructure to support good decision making, and evaluate and manage risk throughout the transition.
Project Cost Not to Exceed:	\$544,500
Funding Source:	Caltrans Metropolitan Planning Funds (Federal Transit Administration 5303) and Bay Area Regional Collaborative (BARC) funds
Fiscal Impact:	Funds are included in the Fiscal Year 2022-23 agency budget.
Motion by Committee:	That the Executive Director or designee is authorized to negotiate and enter into a contract with Sam Schwartz Consulting, LLC to conduct the Regional Zero-Emission Transit Transition Strategy as described above and in the Administration Committee Summary Sheet dated December 14, 2022 and that the Chief Financial Officer is authorized to set aside \$544,500 for such contract.

Administration Committee:

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Federal D. Glover , Chair

Approved:

December 14, 2022