

**Metropolitan Transportation Commission
Administration Committee**

July 13, 2022

Agenda Item 2b - 22-1048

Contract – Priority Conservation Area Refresh: Wallace Roberts & Todd, LLC (\$274,973)

Subject:

Staff requests the Committee’s approval to negotiate and to enter into a contract with Wallace Roberts & Todd, LLC (WRT) in an amount not to exceed \$274,973 for the term of July 27, 2022 through June 30, 2024 to support the Priority Conservation Area (PCA) Refresh effort.

Background:

PCAs are locations nominated by cities, counties, and park/open space districts and designated by the Association of Bay Area Governments (ABAG) for natural habitat protection and open space preservation. PCAs encompass four primary designations: natural landscapes, agricultural lands, urban greening and regional recreation. The planning framework for identifying and designating PCAs was inaugurated in 2007 and received minor updates in 2014. At present, there are over 185 PCAs within the region, located in all nine Bay Area counties.

Since 2013, MTC has awarded over \$26 million in One Bay Area Grant (OBAG) Cycle 1 and Cycle 2 funds in support of 56 total PCA projects. This funding has helped PCA project sponsors acquire or enhance properties designated as PCAs.

In November 2021, MTC was awarded a \$250,000 grant from the Sustainable Agricultural Lands (SALC) Program managed by the California Department of Conservation to engage in a broad-based, multi-partner and multi-stakeholder effort to refresh the PCA planning framework, with a focus on understanding the program’s strengths and weaknesses; articulating a vision for next-generation PCAs; and establishing data-driven and science-based goals and objectives, among others. The PCA Refresh project will also develop guidelines and resources for project sponsors to support high-impact conservation planning and policy decisions.

Procurement Process:

MTC issued a mini Request for Proposals (RFP) on April 19, 2022, for consultant support on project management, partner and stakeholder engagement, data and mapping, and research and report production as part of the PCA Refresh project to prime consultants prequalified on the 2021 Regional Planning Bench in Service Categories 2: Engagement and Outreach and/or 8:

Environment and Resilience, and/or the 2020 Equity Bench in Service Category E:
Environmental Justice.

The RFP was posted on MTC's website and an e-mail advertising the opportunity was sent to all eligible individuals and firms. On April 26, 2022, MTC hosted a Pre-Proposal Conference which was attended by six firms.

MTC received two qualified proposals, led by W. Arthur Gensler dba Gensler (Gensler) and WRT. Each firm's proposal was supported by a team of subconsultants. An evaluation panel of three members comprised of staff from MTC evaluated these proposals, supported by four advisors. The panel scored the final proposals based on the evaluation criteria listed in the below table. The MTC Small Business Enterprise (SBE) Program was also applied, thereby allowing firms participating in the program to be awarded up to ten evaluation preference points. After initial evaluation of proposals, the panel decided to shortlist WRT and proceed with Discussions and a Request for Best and Final Offer (BAFO) to address concerns with WRT's proposal. After receiving WRT's BAFO, the final scores for both firms are indicated below.

Evaluation Criteria	Gensler	WRT
Qualifications and Team Experience (35 points)	23.00	31.33
Approach (25 points)	15.67	23.00
Cost Effectiveness (20 points)	9.67	17.50
Price (10 points)	7.12	10.00
Presentation (10 points)	9.00	9.33
Small Business Enterprise (SBE) Program (10 points)	*	0.00
Total (110 points)	64.45	91.17

*The SBE Program was not evaluated for Gensler's proposal because it was not selected for the shortlist.

Based on its evaluation, the evaluation panel unanimously recommends the team led by WRT based on identified strengths, including:

- A highly qualified team with demonstrated experience working on projects of similar size and scope;

- A team with significant knowledge and staff experience about key regional planning, conservation and environmental issues in the Bay Area;
- A clear understanding of the relationship between Plan Bay Area, the regional long-range plan, and the PCA planning framework;
- A highly detailed and compelling approach to the project, which anticipated and proposed solutions to potential challenge areas.

Funds for this contract are available in the approved FY 2022-23 Agency Budget. Work is anticipated to commence in summer 2022 and complete by fall 2023. The term of the grant agreement with the state, which is the primary funding source for the contract, runs through March 30, 2024, with the option to extend. The term of the consultant contract will run through FY 2023-2024 until June 30, 2024, in the event that additional schedule flexibility is required. At MTC's sole option, the contract may be extended. Additional funding is subject to budgetary approval. Attachment A includes a summary of WRT and its project team's small business and disadvantaged business enterprise status.

Issues:

None identified.

Recommendations:

Staff recommends that the Committee authorize the Executive Director or designee to negotiate and enter into a contract with WRT in an amount not to exceed \$274,973 for the term of July 27, 2022 through June 30, 2024 to support the PCA Refresh project.

Attachments:

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



Therese W. McMillan

Attachment A

Disadvantaged Business Enterprise and Small Business Enterprise Status

	Firm Name	Role on Project	DBE * Yes	If DBE Yes, List #	DBE No	SBE* * Yes	If SBE Yes, List #	SBE No
Prime Contractor	Wallace Roberts & Todd, LLC	Project management / planning / engagement			X			X
Subcontractor	Cultivate, LLC	Working lands advisor	X	43227		X	2000432	
Subcontractor	Greenbelt Alliance	Engagement / mapping			X			X
Subcontractor	Sustainable Agriculture Education (SAGE)	Working lands advisor			X			X

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

**Denotes certification by the State of California.

Request for Committee Approval

Summary of Proposed Contract

Work Item No.: 1611

Consultant: Wallace Roberts & Todd, LLC (WRT) – San Francisco, CA

Work Project Title: Priority Conservation Area (PCA) Refresh

Purpose of Project: To refresh the PCA planning framework

Brief Scope of Work: The purpose of the PCA Refresh project is to engage in a broad-based, multi-partner and multi-stakeholder effort to analyze and improve the PCA planning framework and program. The effort will incorporate a wide range of policy concerns into the planning framework, especially resilience to climate hazards and equity. The project is organized into four major tasks: (1) project management, (2) partner and stakeholder engagement, (3) data and mapping, (4) research and report production.

Project Cost Not to Exceed: \$274,973

Funding Source: California Strategic Growth Council / Sustainable Agricultural Lands Conservation Program (SALCP) (\$250,000); General Fund (\$25,000)

Fiscal Impact: Funds are included in the FY 2022-23 Agency Budget.

Motion by Committee: That the Executive Director or designee is authorized to negotiate and enter into a contract with WRT for the term of July 27, 2022 through June 30, 2024, to support the PCA Refresh project described above and in the Administration Committee Summary Sheet dated July 13, 2022 and that the Chief Financial Officer is authorized to set aside \$274,973 for such contract.

Administration Committee:

Federal D. Glover, Chair

Approved: July 13, 2022