

Metropolitan Transportation Commission Administration Committee

May 12, 2021

Agenda Item 3a - 21-0364

Consultant Bench: 2021 Regional Planning Bench - Cycle 1

(4LEAF, Inc.; Aaron Welch Planning; Acterra: Action for a Healthy Planet; AECOM Technical Services, Inc. ; Alex San Andres; Alta Planning + Design, Inc.; Amira Jackmon; Applied Technology Council; ARUP Americas, Inc. ; Ascent Environmental, Inc.; Atkins North America, Inc.; BAE Urban Economics, Inc.; Baird + Driskell Community Planning; Bang the Table USA LLC; Noelle Bonner (dba Bonner Communications LLC; Center for Creative Land Recycling; CHS Consulting, Inc. (dba CHS Consulting Group); Circlepoint, Inc.; Civic Edge Consulting; CivicKnit; CivicMakers, LLC; Community Design + Architecture, Inc.; Corey, Canapary & Galanis; Craft & Commerce, LLC; Dahlin Group, Inc.; DIALOG Design LP; Diana R. Elrod Consulting; DKS Associates; Economic & Planning Systems, Inc.; Economic Consultants Oregon LTD (dba ECONorthwest); EMC Planning Group Inc; EMC Research, Incorporated; Enterprise Community Partners, Inc. (dba Enterprise Community Partners); Environmental Science Associates; Evan Brooks Associates, Inc. (dba Evans Brooks Associates; Fehr & Peers; Forsyth Street Advisors; Frontier Energy, Inc.; W. Arthur Gensler (dba Gensler), Jr & Associates, Inc.; William R. Gray and Company, Inc. (dba Gray-Bowen-Scott).; David S Greensfelder (dba Greensfelder Commercial Real Estate LLC); Hassell Design LTD; Hatch Associates Consultants, Inc.; Houseal Lavigne Associates, LLC; HR&A Advisors, Inc.; IBI Group, A California Partnership (dba IBI Group); Impact Sciences; Iveywood Consulting; James F. Lima (dba James Lima Planning + Development); Kearns & West, Inc; Kimley-Horn and Associates, Inc.; Kittelson & Associates, Inc.; Land Econ Group LLC; LeSar Development Consultants; Management Partners, Incorporated; Meyers, Nave, Riback, Silver & Wilson, A Professional Corporation; METROPOLITAN PLANNING GROUP; Michael Baker International, Inc.; Moore Iacofano Goltsman, Inc.; Mintier Harnish, LP; Mithun, Inc.; NelsonNygaard Consulting Associates, Inc.; Next Steps Marketing; Opticos Design, Inc.; Page Southerland Page, Inc.; Perkins+Will, Inc.; PlaceWorks, Inc. (dba PlaceWorks); Raimi + Associates, Inc.; Laura Crescimano (RC Design Collaborative, LLC dba SITELAB urban studio); Redhill Group Inc.; Resource Development Associates, Inc.; Rincon Consultants, Inc.; RSG, Inc.; Sam Schwartz Engineering, D.P.C.; Deborah E. Schechter (dba Schechter Consulting); SERA Architects, Inc. (dba SERA Design and Architecture, Inc.); SmithGroup; Sperry Capital Inc.; Steer Davies & Gleave Inc.; Strategic Economics; Symbium Corp.; SZS Engineering Access Inc.; Turner Housing Innovation Labs, Inc; The Concord Group, LLC; T J K M (dba TJKM Transportation Consultants); Toole Design Group, LLC; Trillium Advisors, LLC; Urban Land Institute; Urban Planning Partners; UrbanFootprint, Inc.; Vila Civil, APC; Woodsong Associates; Wallace Roberts & Todd, LLC; WSP USA Inc.)

Subject:

A request for Committee approval of a pre-qualified Regional Planning Bench of consultants summarized in Attachment A ("Bench") to provide as-needed planning consulting services to MTC, the Association of Bay Area Governments (ABAG), the Bay Area Housing Finance Authority (BAHFA), and 109 local governments in the Bay Area, including for grants administered through the Priority Development Area and Regional Housing Technical Assistance Programs (PDA Programs). The

term of the Bench is through December 30, 2023, with an option to extend for an additional two years to December 30, 2025.

Background:

MTC and ABAG jointly issued a Request for Qualifications (“RFQ”) for a Bench that includes 11 service categories seeking a wide range of housing and transportation planning expertise. Planning activities for which consultants are contracted will help forward the goals of the PDA Programs, among other state and federally funded regional programs. The RFQ also contains a Cooperative Use Clause that allows all 109 Bay Area jurisdictions to directly hire off this bench if their local procurement rules allow. To streamline procurements even further, local staff will be given access to an online database where they can search for 2021 Regional Planning Bench consultants who best meet their needs and easily compare consultants.

Additionally, MTC will allow Bay Area jurisdictions to elect to leave their PDA awards on deposit with MTC and have MTC handle the contracting and invoicing for Bench consultants to perform scopes of work designed by local jurisdictions. ABAG will offer the same option to recipients of state funding through the Regional Early Action Planning (REAP) grants.

Procurement Process:

The RFQ for the 2021 Regional Planning Bench – Cycle 1 was issued on January 7, 2021. The RFQ invited firms to submit Statements of Qualifications (“SOQ”) for one or more of the following eleven service categories:

1. Comprehensive Planning
2. Engagement and Outreach
3. Housing Policy and Planning
4. Process Improvements
5. Transportation Policy and Implementation
6. Transportation Program Development and Administration
7. Economic & Real Estate Analysis
8. Environment and Resilience
9. Legal Counsel
10. Temporary Staffing for Local Governments
11. Grant Writing

Email notification of the opportunity was sent to over 6,440 individuals, firms, and academic institutions. Staff hosted a pre-proposal conference on January 14, 2021 via Zoom, which provided opportunities for the Small and Disadvantaged Business Enterprises (SBE/DBE) and larger firms to ask questions about upcoming project opportunities and about the contract process. More than 125 individuals attended the pre-proposal conference.

Staff also took steps to encourage participation from SBE/DBE firms, by conducting outreach early in the process and simplifying complex contracting requirements as follows:

- Contracts staff began communicating information about the upcoming RFQ to their contacts in November 2021, resulting in 94 proposers from across the state and the nation.
- Contracting requirements were simplified to encourage SBE/DBEs participation. This involved simplifying minimum qualifications and required qualifications.
- To catalyze new opportunities for early planners, the RFQ included a new "Statement of Experience and Interest Form." Individuals and entities that did not meet the RFQ's Minimum Qualifications were encouraged to complete this form to demonstrate that they have the background, skills, or education suitable to provide some of the services sought for consideration by qualified bidders assembling teams.

Records indicate that 264 individuals or firms downloaded the RFQ and related documents. On February 4, 2021, MTC received 94 SOQs, many of which applied to more than one service category, as shown in the table below:

Service Category	Number of Total Applicants
1. Comprehensive Planning	39
2. Engagement & Outreach	47
3. Housing Policy & Planning	37
4. Process Improvements	19
5. Transportation Policy & Implementation	33
6. Transportation Program Development & Administration	23
7. Economic & Real Estate Analysis	29
8. Environment & Resilience	32
9. Legal Counsel	2
10. Temporary Staffing for Local Governments	10
11. Grant Writing	21
TOTAL	94

Separate evaluation panels comprised of MTC staff from multiple sections reviewed applicants for each of the eleven service categories based upon the following evaluation criteria:

Proposers total number of years of experience (2 minimum) in Service Category	20%
Proposers total number of projects (2 minimum) in Service Category	20%
Hourly rates	10%
Bay Area experience in Service Category	10%
Quality and relevance of all projects listed in Service Category	40%
Possible Total	100%

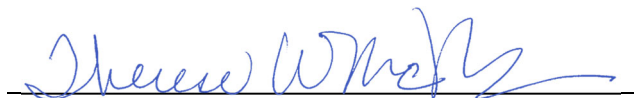
For each service category, the firms that the evaluation panel recommends for inclusion on the Regional Planning Bench are indicated with a number “1” in Attachment A. All recommended firms demonstrate expertise in the service category(ies) for which they were selected and provide a mix of local and national experience and expertise that will be valuable in supporting MTC and local agencies with their planning activities. Firms which are not recommended for inclusion on the Bench for a particular service category are indicated by the number “0” in Attachment A. Attachment A also indicates each firm’s SBE/DBE status.

Any firms approved in Cycle 1 will be eligible for work throughout the approved term of the Regional Planning Bench, which is from the date of this Committee approval through December 31, 2023, with an option to extend for an additional two years to December 30, 2025. Selection for entry into a contract with one of the pre-qualified consultants may take place by direct selection or via a mini-procurement, pursuant to MTC’s Third-Party Contracting Policies and Procedures. Additional firms may be added to the 2021 Regional Planning Bench in response to re-issuance of the RFQ in later cycles. Contract periods of performance and amounts will be determined on a per-contract basis based on the project solicited to the 2021 Regional Planning Bench. Staff will return to the Administration Committee for authorization of any contracts exceeding the Executive Director’s signature authority.

Issues: None

Recommendation: Staff recommends that the Administration Committee approve the pre-qualified consultants identified in Attachment A for the Regional Planning Bench to provide planning consultant assistance services in the specified categories on an as-needed basis, for a period through December 30, 2023, with an option to extend for an additional two years to December 30, 2025.

Attachments: Attachment A: List of Pre-Qualified Panel of Consultants for the 2021 Regional Planning Bench;
Request for Committee Approval - Summary of Proposed Consultant Bench; and
Presentation Slides


Therese W. McMillan

**Attachment A: 2021 Regional Planning Bench
List of Firms and Service Categories**

NOTE: When proposals included teams of firms, only the prime consultant is listed below. Many qualifying proposals included teams with subconsultants. Questions regarding specific subconsultants may be directed to staff.

Firm	SBE/ DBE*	1 - Comprehensive Planning	2 - Engagement and Outreach	3 - Housing Policy and Planning	4 - Process Improvements	5 - Transportation Policy and Implementation	6 - Transportation Program Development and Administration	7 - Economic & Real Estate Analysis	8 - Environment and Resilience	9 - Legal Counsel	10 - Temporary Staffing for Local Governments	11 - Grant Writing
4LEAF, Inc.	–	1		1	1						1	
Aaron Welch Planning	SBE, SUBS	1	1	1	1	1	1	1	1		1	1
Acterra: Action for a Healthy Planet	–		1									
AECOM Technical Services, Inc.	SUBS	1		1	1	1	1	1	1			1
Alex San Andres	–	1	1		0			0	0			
Alta Planning + Design, Inc.	–					1	1				1	1
Amira Jackmon	–			0	0	0				0		
Applied Technology Council	–	0	0						1			
ARUP Americas, Inc.	SUBS			1		1	1	1	1			
Ascent Environmental, Inc.	SBE, SUBS	1		1		1			1			
Atkins North America, Inc.	SUBS		1		1	1	1		1			
BAE Urban Economics, Inc.	DBE/SBE			1				1				
Baird + Driskell Community Planning	–	1	1	1	1			1	0			
Bang the Table USA LLC	–		1									
Noelle Bonner (dba Bonner Communications LLC)	SBE		1									
Center for Creative Land Recycling	–		1						1			1

Firm	SBE/ DBE*	1 - Comprehensive Planning	2 - Engagement and Outreach	3 - Housing Policy and Planning	4 - Process Improvements	5 - Transportation Policy and Implementation	6 - Transportation Program Development and Administration	7 - Economic & Real Estate Analysis	8 - Environment and Resilience	9 - Legal Counsel	10 - Temporary Staffing for Local Governments	11 - Grant Writing
CHS Consulting, Inc. (dba CHS Consulting Group)	–					1	1					
Circlepoint, Inc.	–		1									
Civic Edge Consulting	–		1								0	
CivicKnit	–		1			0			0			
CivicMakers, LLC	–		1									
Community Design + Architecture, Inc.	SUBS	1	1			1	1					1
Corey, Canapary & Galanis	SBE, SUBS	0	1			1	1	0				
Craft & Commerce, LLC	–		1									
Dahlin Group, Inc.	SUBS	1										
DIALOG Design LP	SUBS	1										
Diana R. Elrod Consulting	–			1								
DKS Associates	SUBS		1			1						
Economic & Planning Systems, Inc.	SBE							1				
Economic Consultants Oregon LTD (dba ECONorthwest)	SUBS	0		1				1				
EMC Planning Group Inc. (dba EMC Planning Group)	–	1		1					1			
EMC Research, Incorporated	–		1									
Enterprise Community Partners, Inc.	–			1								1
Environmental Science Associates	–	1		1					1			

Firm	SBE/ DBE*	1 - Comprehensive Planning	2 - Engagement and Outreach	3 - Housing Policy and Planning	4 - Process Improvements	5 - Transportation Policy and Implementation	6 - Transportation Program Development and Administration	7 - Economic & Real Estate Analysis	8 - Environment and Resilience	9 - Legal Counsel	10 - Temporary Staffing for Local Governments	11 - Grant Writing
Evan Brooks Associates, Inc. (dba Evan Brooks Associates)	DBE/SBE		1									1
Fehr & Peers	–	0	1			1	1		1			1
Forsyth Street Advisors	–			1				1				
Frontier Energy, Inc.	–		1			0	0		1			
W. Arthur Gensler, Jr & Associates, Inc. (dba Gensler)	SUBS	1	1									
William R. Gray and Company, Inc. (dba Gray-Bowen-Scott)	DBE/SBE					1	1					1
David S Greensfelder (dba Greensfelder Commercial Real Estate LLC)	SBE							1				
Hassell Design LTD	SUBS	1	1	1		1			1			
Hatch Associates Consultants, Inc.	–					1	0	1				
Houseal Lavigne Associates, LLC	SUBS	1										
HR&A Advisors, Inc.	SUBS		1	1				1				
IBI Group, A California Partnership (dba IBI Group)	–					1	1					
Impact Sciences	DBE/SBE								1			
Iveywood Consulting	–		0									
James F. Lima (dba James Lima Planning + Development)	SUBS			1				1				
Kearns & West, Inc	DBE/SBE		1									
Kimley-Horn and Associates, Inc.	SUBS		1	1		1	1					1
Kittelson & Associates, Inc.	SUBS	0				1	1					1

Firm	SBE/ DBE*	1 - Comprehensive Planning	2 - Engagement and Outreach	3 - Housing Policy and Planning	4 - Process Improvements	5 - Transportation Policy and Implementation	6 - Transportation Program Development and Administration	7 - Economic & Real Estate Analysis	8 - Environment and Resilience	9 - Legal Counsel	10 - Temporary Staffing for Local Governments	11 - Grant Writing
Land Econ Group LLC	DBE/SBE							1				
LeSar Development Consultants	–	0	1	1	1			1				
Management Partners, Incorporated	–		0		1			1			1	
Meyers, Nave, Riback, Silver & Wilson, A Professional Corporation	–									1		
METROPOLITAN PLANNING GROUP	–	1	1	1	1				1		1	1
Michael Baker International, Inc.	SUBS	1	1	1				1	1		1	1
Moore Iacofano Goltsman, Inc.	–	1	1	1	1				0		1	
Mintier Harnish, LP	–	1	1	1	1				1			
Mithun, Inc.		1		1					1			
Nelson/Nygaard Consulting Associates, Inc.						1	1					
Next Steps Marketing	SBE/DBE		1									
Opticos Design, Inc.		1	1	1	1							
Page Southerland Page, Inc.		1										
Perkins+Will, Inc.		1	1						1			
PlaceWorks, Inc. (dba PlaceWorks)		1	1	1		1		1	1			
Raimi + Associates, Inc.		1		1					1			
Laura Crescimano (RC Design Collaborative, LLC dba SITELAB urban studio)	SBE	1	1									
Redhill Group Inc.	SBE		1			1	1					

Firm	SBE/ DBE*	1 - Comprehensive Planning	2 - Engagement and Outreach	3 - Housing Policy and Planning	4 - Process Improvements	5 - Transportation Policy and Implementation	6 - Transportation Program Development and Administration	7 - Economic & Real Estate Analysis	8 - Environment and Resilience	9 - Legal Counsel	10 - Temporary Staffing for Local Governments	11 - Grant Writing
Resource Development Associates, Inc.			1									1
Rincon Consultants, Inc.		1	1	1	1				1		1	1
RSG, Inc.	SBE							1				
Sam Schwartz Engineering, D.P.C.	SUBS					1	1					
Deborah E. Schechter (dba Schechter Consulting)	SBE		1									
SERA Architects, Inc. (dba SERA Design and Architecture, Inc.)		1				1						
SmithGroup	SUBS	1	1	1		1	1	1	0			0
Sperry Capital Inc.	SBE			0				1	0			
Steer Davies & Gleave Inc.	SUBS					1	1					
Strategic Economics				1				1				
Symbium Corp.					1			0				
SZS Engineering Access Inc.	DBE/SBE				1							
Terner Housing Innovation Labs, Inc.				1				1				
The Concord Group, LLC	SBE							1				
T J K M (dba TJKM Transportation Consultants)	DBE/SBE					1						1
Toole Design Group, LLC	SBE	0	1			1	1					1
Trillium Advisors, LLC				1								
Urban Land Institute			1	1	1	0		1				
Urban Planning Partners	SBE	1	1	1	1				1		1	1
UrbanFootprint, Inc.		0		1		0		0	0			

Firm	SBE/ DBE*	1 - Comprehensive Planning	2 - Engagement and Outreach	3 - Housing Policy and Planning	4 - Process Improvements	5 - Transportation Policy and Implementation	6 - Transportation Program Development and Administration	7 - Economic & Real Estate Analysis	8 - Environment and Resilience	9 - Legal Counsel	10 - Temporary Staffing for Local Governments	11 - Grant Writing
Vila Civil, APC	DBE/SBE											1
Woodsong Assoicates, LLC		1		1	1	1	0	1	0			
Wallace Roberts & Todd, LLC		1							1			
WSP USA Inc.			1			1	1		1			1

Total Submissions per Category	39	47	37	19	33	23	29	32	2	10	21
Total Seated per Category	31	44	35	17	28	20	25	24	1	9	20
Total Accepted Prime DBE Firms vs Total DBE Firms that Proposed	1 of 1	5 of 5	1 of 1	1 of 2	3 of 3	2 of 2	2 of 3	1 of 2	0 of 0	0 of 0	4 of 4
Total Accepted Prime SBE Firms vs Total SBE Firms that Proposed	5 of 7	13 of 13	5 of 6	2 of 3	8 of 8	6 of 6	8 of 10	4 of 6	0 of 0	2 of 2	6 of 6
Total Accepted Primes with DBE/SBE SUBS vs Total Primes that Proposed with DBE/SBE SUBS	16 of 17	11 of 11	18 of 18	4 of 4	15 of 15	10 of 11	11 of 11	13 of 15	0 of 0	3 of 3	7 of 8

* This field notes whether the prime consultant is a Disadvantaged Business Enterprise (DBE), a Small Business Enterprise (SBE), both (DBE/SBE), or whether at least one of the subconsultants on a team is a DBE or SBE (noted with "SUBS").

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Consultant Bench

Work Item No.:	To be determined on a per-contract basis
Consultants:	See Attachment A to the MTC Administration Committee Summary Sheet for the 2021 Regional Planning Bench - Cycle 1, dated May 12, 2021
Work Project Title:	2021 Regional Planning Bench – Cycle 1
Purpose of Project:	Provide as-needed consulting services to support MTC, ABAG, BAHFA, and 109 Bay Area local jurisdictions, including grants administered through the Priority Development Area and Regional Housing Technical Assistance Programs
Brief Scope of Work:	<p>Provide as-needed consulting assistance in the following service categories:</p> <ol style="list-style-type: none">1. Comprehensive Planning2. Engagement and Outreach3. Housing Policy and Planning4. Process Improvements5. Transportation Policy and Implementation6. Transportation Program Development and Administration7. Economic & Real Estate Analysis8. Environment and Resilience9. Legal Counsel10. Temporary Staffing for Local Governments11. Grant Writing
Project Cost Not to Exceed:	To be determined on a per-contract basis.
Funding Source:	To be determined on a per-contract basis.
Fiscal Impact:	No immediate fiscal impact until contracts are awarded. Funds for future fiscal years are subject to agency budgetary approval process.
Motion by Committee:	That the consultants listed in Attachment A to the MTC Administration Committee Summary Sheet dated May 12, 2021 be pre-qualified to enter into contracts with MTC to provide as-needed planning consulting services through December 30, 2023, with an option to extend for an additional two years to December 30, 2025, as described above and in the MTC Administration Committee Summary Sheet dated May 12, 2021 subject to applicable contract approval procedures and necessary budget approvals.
Administration Committee:	<hr/> <p>Federal Glover, Chair</p>
Approved:	May 12, 2021