

## Association of Bay Area Governments

### Housing Committee

May 13, 2021

Agenda Item 7.a.

#### Regional Planning Bench

**Subject:** Approval of 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.; Nelson\Nygaard 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

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Partners; UrbanFootprint, Inc.; Vila Civil, APC; Woodsong Associates; Wallace Roberts & Todd, LLC; WSP USA Inc.)

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 the Association of Bay Area Governments (ABAG), the Metropolitan Transportation Commission (MTC), the Bay Area Housing Finance Authority (BAHFA), and 109 local governments in the Bay Area, including for grants administered through the Regional Housing Technical Assistance and Priority Development Area 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:**

On November 19, 2020, the ABAG Executive Board approved the Regional Housing Technical Assistance Program Design and Framework, including over \$10M in suballocations of Regional Early Action Planning (“REAP”) funding to Bay Area jurisdictions and the establishment of a Regional Planning Bench (“Bench”). The Bench was included in response to input received from local planning staff throughout the Bay Area that the procurement process itself can be burdensome and can make it difficult to efficiently spend planning grant funding from the state and from ABAG. For example, some recent local procurements have received no bids due to the high demand for planning consultants.

ABAG and MTC 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 REAP program, 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, ABAG will allow Bay Area jurisdictions to elect to leave their REAP suballocations on deposit with ABAG and have ABAG handle the contracting and invoicing for Bench consultants to perform scopes of work designed by local jurisdictions. MTC will offer the same option to recipients of federal funding through the Priority Development Area (PDA) grants.

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**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 2020, 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.

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Records indicate that 264 individuals or firms downloaded the RFQ and related documents. On February 4, 2021, ABAG 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                         |
| <b>TOTAL</b>   | <b>94</b>                  |

Separate evaluation panels comprised of MTC-ABAG 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%         |
| <b>Possible Total</b>   | <b>100%</b> |

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 ABAG and local agencies with their planning activities. Firms which are not recommended for inclusion on the Bench

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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 ABAG'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 appropriate Committee for authorization of any contracts exceeding the Executive Director's signature authority.

**Issues:** None

**Recommendation:** The ABAG Housing Committee is requested to recommend ABAG Executive Board approval of 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:** A: List of Pre-Qualified Panel of Consultants for the 2021 Regional Planning Bench

B. Summary of Executive Board Approval

C. Presentation Slides

**Reviewed:**



Therese W. McMillan