



Memorandum

Date: 04.05.16 **RE:** Finance Committee
April 12, 2016

To: Finance Committee: Commissioners Mar (Chair), Cohen (Vice Chair), Campos, Kim, Yee and Wiener (Ex Officio)

From: Rachel Hiatt – Interim Deputy Director for Planning *RH*

Through: Tilly Chang – Executive Director *TC*

Subject: **ACTION** – Recommend Awarding Three-Year Consultant Contracts, with an Option to Extend for Two Additional One-Year Periods, to Arup North America Ltd., Iteris, Inc., Nelson\Nygaard Consulting Associates, Stantec Consulting Services, Inc. and WSP Parsons Brinckerhoff, for a Combined Amount Not to Exceed \$2,000,000 for On-Call Transportation Planning Services and Authorize the Executive Director to Negotiate Contract Payment Terms and Non-Material Contract Terms and Conditions

Summary

On January 27, 2016, the Transportation Authority issued a Request for Qualifications (RFQ) for on-call transportation planning services to support the Transportation Authority's work program over the next three years, up to a maximum of five years. The establishment of contracts with one or more consultant teams will enable the Transportation Authority to enlist the services of a broad range of transportation planning specialists on an on-call, task order basis. By the due date of March 3, 2016, the Transportation Authority received six Statements of Qualifications in response to the RFQ. Interviews were held between March 16 and 17, 2016. Based on this competitive selection process, the review panel, with participation from the San Francisco Municipal Transportation Agency and the Transportation Authority, recommends the award of consultant contracts to the five top-ranked teams: Arup North America Ltd., Iteris, Inc., Nelson\Nygaard Consulting Associates, Stantec Consulting Services, Inc. and WSP Parsons Brinckerhoff.

BACKGROUND

The Transportation Authority is seeking on-call transportation planning services to support its work program over the next three years. The establishment of contracts with one or more consultant teams will enable the Transportation Authority to enlist the services of a broad range of transportation planning specialists on an on-call, task order basis.

The Transportation Authority has long-range countywide, neighborhood-scale, and project-level planning and policy advisory capabilities that stem from its multiple roles.

As Congestion Management Agency (CMA), the Transportation Authority conducts local and regional planning studies addressing congestion management and transportation system development issues. The agency also conducts pilot projects and research studies in coordination with public agencies and non-government entities. As sales tax administrator, the Transportation Authority leads project development planning and design studies to advance key Transportation Authority Board or Prop K priorities,

particularly where multi-jurisdictional conditions exist, and conducts oversight to ensure timely delivery of other Prop K planning projects.

These and other planning activities led by the Transportation Authority require varying types and levels of project management and project development support in the following areas:

San Francisco Transportation Plan (SFTP): The Transportation Authority adopts a long-range countywide transportation plan, the SFTP, which serves as the city's blueprint for transportation system development and investment over the next 30 years. The SFTP identifies key transportation needs, through an analysis of future trends, and aligns these needs with projected available funding. The SFTP includes background papers and studies and strategic policy initiatives to support the investments in the transportation system.

The Transportation Authority intends to adopt a minor update to the 2013 SFTP in 2016. This update may recommend follow-on studies or reports to be conducted using on-call planning support.

Neighborhood Transportation Improvement Program (NTIP) Planning Studies: The purpose of the NTIP is to build community awareness of – and capacity to provide input to – the transportation planning process, and to advance delivery of community-supported neighborhood-scale projects. The NTIP helps accomplish the latter through strengthening project pipelines or helping move individual projects more quickly toward implementation, especially in Communities of Concern (COC) or other neighborhoods with high unmet needs. All NTIP efforts are prioritized by the district Supervisor to address one or more of the following Prop K eligible activities:

- Improve pedestrian and/or bicycle safety;
- Encourage walking and/or biking;
- Improve transit accessibility;
- Improve mobility for COC or other underserved neighborhoods and vulnerable populations (e.g., seniors, children, and/or people with disabilities).

Policy Studies and Strategic Analysis Reports (SARs): Policy studies address a range of topics from parking to congestion pricing to transportation demand management. SARs are brief, but comprehensive reports requested by the Transportation Authority Board to help evaluate and develop policy recommendations on specific transportation issues. The Transportation Authority prepares one to two reports per year and each of these typically involves some research, data collection, analysis and report writing.

Corridor and Area Planning Studies: The Transportation Authority prepares and reviews transportation planning studies. The Transportation Authority is leading several transportation studies, including the Freeway Corridor Management Study; the BART Smart Travel Rewards Pilot Project; and service planning for the Late Night Transportation Study. Several new studies are undertaken each year. The Transportation Authority also leads deliverables, reviews, and provides input to other local, regional, and statewide transportation plans, such as the Transit Core Capacity Study, led by the Metropolitan Transportation Commission, and the Transportation Sustainability Program, led by San Francisco Municipal Transportation Agency (SFMTA).

Treasure Island Mobility Management: As the Treasure Island Mobility Management Agency, the Transportation Authority carries out planning for the implementation of a new transportation system on Treasure and Yerba Buena Islands. Planning for the mobility program includes toll policy analysis; transit demand and fare study; development of a multi-operator mandatory transit pass; Travel Demand Management programs; and transportation programs for low-income residents and workers, such as a program to earn toll credits through transit travel. The Transportation Authority also coordinates the transportation plans

with the overall development program; with island parking policy development, led by SFMTA; and with the San-Francisco-Oakland Bay Bridge toll policy.

DISCUSSION

The Transportation Authority seeks transportation planning teams with expertise in multimodal transportation planning and conceptual design, outreach, and program management. General areas of expertise sought in prospective teams include:

- Project/Program Management
- Transportation Planning and Design
- Community Involvement and Community Based Planning
- Design and Cost Estimation
- Modeling/Data Analysis
- Policy and Economic Analysis
- Technology-Enabled Transportation
- Transportation Systems Engineering Design and Operations

Procurement Process: We issued a Request for Qualifications (RFQ) for on-call transportation planning services on January 27, 2016. We held a pre-response conference on February 2, 2016, which provided opportunities for small businesses and larger firms to meet and form partnerships. 37 firms attended the conference.

We took steps to encourage participation from small and disadvantaged business enterprises, including advertising in six local newspapers: the San Francisco Chronicle, the San Francisco Examiner, the San Francisco Bay View, Nichi Bei, the Small Business Exchange, and the Western Edition. We also distributed the RFQ, sign-in sheets for the pre-response conference, and periodic updates on the RFQ to certified small, disadvantaged and local businesses, Bay Area and cultural Chambers of Commerce, and the Small Business Councils.

By the due date of March 3, 2016, we received six Statements of Qualifications (SOQs) in response to the RFQ. Interviews were held with all six qualified teams on March 16 and 17, 2016. Interviews were conducted by a selection panel comprised of representatives from SFMTA and Transportation Authority staff. The selection panel evaluated the SOQs based on qualifications and other criteria identified in the RFQ, with an emphasis on bidders' responses to hypothetical scenarios as well as their capabilities and experience. Based on the competitive process defined in the evaluation criteria of the RFQ document, the selection panel recommends awarding contracts to the five highest-ranked firms: Arup North America Limited (Arup), Iteris, Inc. (Iteris), Nelson\Nygaard Consulting Associates (Nelson\Nygaard), Stantec Consulting Services Inc. (Stantec) and WSP Parsons Brinckerhoff.

Each of the five highest-ranked teams provides a unique set of skills, technical specialists, and relevant project experience, particularly in program management. In particular, Arup demonstrates strong capabilities in transit and highway operations analysis and other requested task areas, Iteris provides the ability to draw travel and performance insights from big data, Nelson\Nygaard builds upon a proven track record of performance in a majority of on-call services task areas including NTIP studies, Stantec brings relevant experience in toll system design and delivery, and WSP Parsons Brinckerhoff supports a number of emerging efforts in TDM, travel incentives, and ridematching.

Given the wide range of desired proficiencies and experience, the amount and complexity of the Transportation Authority's work program, and occasional conflicts of interest or availability that arise for specific efforts, there is a need for broad and deep access to transportation planning skills in the on-call planning contract. We propose to contract with multiple consultant teams with whom the Transportation Authority may call upon on a task order basis. Such an arrangement is currently in place through the Transportation Authority's current on-call transportation planning contracts, which has proved beneficial to the Transportation Authority's Planning Division's work program.

Consultants selected for a contract will remain eligible for consideration for task order negotiation on an as-needed basis for the initial three-year term. While the Transportation Authority intends to engage pre-qualified firms based on capabilities, experience and availability, no selected team is guaranteed a task order. In addition, transportation planning services tasks valued above \$150,000 will be bid under a separate procurement process.

We will receive federal financing assistance to fund a portion of this contract, and will adhere to federal procurement regulations. For this contract, we established a Disadvantaged Business Enterprise (DBE) goal of 10%, accepting certifications by the California Unified Certification Program. SOQs from all five teams met or exceeded the DBE goal. Details of each team's proposed DBE participation is included in Attachment 2.

ALTERNATIVES

1. Recommend awarding three-year consultant contracts, with an option to extend for two additional one-year periods, to Arup, Iteris, Nelson\Nygaard, Stantec and WSP Parsons Brinckerhoff, for a combined amount not to exceed \$2,000,000 for on-call transportation planning services and authorize the Executive Director to negotiate contract payment terms and non-material contract terms and conditions, as requested.
2. Recommend awarding three-year consultant contracts, with an option to extend for two additional one-year periods, to Arup, Iteris, Nelson\Nygaard, Stantec and WSP Parsons Brinckerhoff, for a combined amount not to exceed \$2,000,000 for on-call transportation planning services and authorize the Executive Director to negotiate contract payment terms and non-material contract terms and conditions, with modifications.
3. Defer action, pending additional information or further staff analysis.

CAC POSITION

The subject request was not presented to the CAC at its March 23, 2016 meeting since proposal interviews and evaluations were still underway.

FINANCIAL IMPACTS

The scope of work described in the RFQ is anticipated in the Transportation Authority's adopted Fiscal Year 2015/16 work program and budget through relevant projects and studies, including the San Francisco Transportation Plan. Budget for these activities will be funded by a combination of federal Surface Transportation Planning grants, federal grants from Caltrans and the Metropolitan Transportation Commission, local contributions from the Treasure Island Development Authority and Prop K sales tax funds. The first year's activities are included in the Transportation Authority's mid-year budget amendment, which is the subject of a separate request. Sufficient funds will be included in future fiscal year budgets to cover the cost of these contracts.

RECOMMENDATION

Recommend awarding three-year consultant contracts, with an option to extend for two additional one-year periods, to Arup, Iteris, Nelson\Nygaard, Stantec and WSP Parsons Brinckerhoff, for a combined amount not to exceed \$2,000,000 for on-call transportation planning services and authorize the Executive Director to negotiate contract payment terms and non-material contract terms and conditions.

Attachments (2):

1. On-Call Planning Services Scope of Work
2. Proposed Disadvantaged Business Enterprise Firms

Attachment 1
On-Call Transportation Planning Services
Scope of Work

Transportation Planning Technical Assistance Required: The Transportation Authority seeks transportation planning teams with expertise in multimodal transportation planning and design, outreach and program management. A list of eight general areas of expertise sought in prospective teams is provided below, lettered *A* through *H*. All teams must demonstrate skills and experience in *A* and in four additional expertise areas, from *B* through *H*. Teams must declare which capabilities they are qualified to support.

A. Project/Program Management

- a. Scope, schedule, budget management
- b. Workplan management

B. Transportation Planning and Design

- a. Network/modal planning and design
 - i. Pedestrian, bicycle network
 - ii. Transit network and/or service planning
 - iii. Traffic engineering, circulation studies
 - iv. On- and off-street parking management
- b. Land use/transportation planning
 - i. Land use/housing policy
 - ii. Station-area, transit-oriented development planning and plan reviews
- c. TDM
 - i. Development conditions/approval policy
 - ii. Strategies for managing existing development, including pricing and incentives
 - iii. Information/marketing/education
- d. Coordination with state and federal agencies (e.g., the California Department of Transportation (Caltrans); Federal Transit Administration (FTA), or Federal Highways Administration (FHWA))
- e. California Environmental Quality Act/National Environmental Policy Act
 - i. Environmental Justice/Title VI

C. Community Involvement and Community Based Planning

- a. Outreach
 - i. Community organizing
 - ii. Facilitation
 - iii. Multi-media (electronic and non-electronic) outreach methods
- b. Translation, interpretation
- c. Visualization

D. Design and Cost Estimation

- a. Conceptual design through 30% design engineering
- b. Street/streetscape design
- c. Planning level cost estimation

E. Modeling/Data Analysis

- a. Data Collection
- b. Data analysis (e.g., of model output, or of third-party cellular or GPS data)
- c. Multimodal micro-simulation
- d. Mapping

F. Policy and Economic Analysis

- a. Economic impact analysis
- b. Fiscal and financial analysis
- c. Market analysis and/or transportation business plan development
- d. Climate/sustainability
- e. Equity analysis

G. Technology-Enabled Transportation

- a. Innovative technology assessment
- b. Mobile application design and development
- c. Connected and autonomous transportation technologies

H. Transportation Systems Engineering Design and Operations

- a. Systems management and integration oversight
- b. Payment technology design and implementation
- c. Traveler information systems

The Transportation Authority anticipates needing on-call transportation planning assistance in the following areas in Fiscal Years (FY) 2015/16 through FY 2017/2018:

1. **NTIP Program:** The Transportation Authority's NTIP Program is a community-based approach for identifying high-priority transportation needs and developing conceptual designs and pilot concepts for transportation improvements in neighborhoods throughout San Francisco. Each NTIP seeks to address both community concerns regarding neighborhood transportation conditions and to engage District and community leadership in the planning process.
2. **SFTP Background Papers and/or Follow-On Studies:** The Transportation Authority is preparing a minor update to the 2013 SFTP and plans to seek Board approval in summer 2016. The SFTP update is anticipated to produce recommendations for follow-on studies that may require assistance from the on-call planning contract. In particular, we anticipate that the SFTP will continue initiatives from the 2013 SFTP as well as address emerging sector needs. Consultant support may be needed for the planning, design, and/or pilot/operation and evaluation of strategies in the following areas:
 - Specialized travel markets: A significant number of trips in San Francisco occur outside of the standard morning and evening peak periods. The Transportation Authority may seek consultant assistance in developing specialized policies or service solutions to address the needs of these travelers and trips, including those related to paratransit, school, trips occurring in the late night and early morning, trips by visitors and tourists, and goods/freight movement, among others.
 - New/Emerging Transportation Technology/Solutions:
 - a. Shared Mobility and For-Hire Transportation: The rise of privately-provided mobility services, or technology-enabled mobility services, requires policy

response to help the public sector evaluate the benefits and impacts and promote the application and integration of these technologies to support transportation goals. The Transportation Authority may seek consultant support to establish a working policy framework, targets, and metrics to assess whether and how new transportation technologies are helping San Francisco meet its transportation, goals related to safety, mobility, the environment, economic vitality, and equity.

- b. **Connected Vehicles and Autonomous Vehicles:** Consultant may be asked to support scoping, planning, and project development related to connected vehicles and/or automated vehicle technology.
 - c. **Payment Technology and Traveler Information:** The Transportation Authority may seek Consultant support for the planning, design, and/or deployment of software development related to mobile application and application-based payment technologies in support of programs such as travel incentives and rebates, travel behavior monitoring, and user information.
3. **Freeway Corridor Management Studies:** The Transportation Authority is currently leading the FCMS Phase 2, which will examine US 101/I-80 and a portion of I-280 for opportunities to provide a managed lane. Consultant may be asked to support the Caltrans project development process, such as through preparation of Project Initiation Documents.
4. **Regional Transit Service Analysis and Planning:** Consultant may be asked to support transit service planning efforts, such as to close regional and local transit service gaps or meet unmet market demands, through coordination with and planning for both public, private, fixed, and variable route transit service providers. For example, the Transportation Authority is leading an analysis to refresh and consider expansion of all-night local and regional bus service through the Late Night Transportation Study Phase II.
5. **Transit Core Capacity Study Follow-On Project Development:** Led by MTC, with support from the Transportation Authority, the Transit Core Capacity Study is a two-year effort to will identify major transit capacity improvements for the Transbay corridor and provide a conceptual phasing of individual projects. Consultant may be asked to support follow-on project evaluation and development of Transit Core Capacity Study recommendations.
6. **BART Smart Travel Rewards Pilot:** The Transportation Authority is currently co-leading this pilot with BART to address crowding by incentivizing riders to shift travel to the shoulders of the peak period or to other stations and routes. The incentive involves a BART loyalty program whereby riders receive rewards for using BART during off-peak periods. Consultant may support aspects of this pilot, or of follow-on studies and evaluations.
7. **Transit Corridor/Station or Area Plans:** The Transportation Authority is actively engaged with multiple agencies in planning activities at or near several stations/multi-modal hubs including the Balboa Park BART/Muni Station and the Bayshore Caltrain Station. We also provide technical assistance on corridor or area plans such as the Better Market Street project, the Railyard/Boulevard Study, and the 19th Avenue/M-Ocean View Project. Several of these studies currently have grant funding with dedicated consultant support, but may have supplemental needs or require specialized technical support in the future.
8. **TDM Initiatives:** Consultant may be asked to provide TDM policy analysis, stakeholder facilitation, program design, implementation support, and/or project evaluation services.

9. **SAR/Policy Analysis Support:** SARs are carried out at the request of the Transportation Authority Board, to frame current issues of concern and to inform policy development regarding specific transportation issues which may not be adequately addressed by existing regulations or policy. Occasionally, the Transportation Authority Board or other agency requests assistance in transportation planning, or Transportation Authority-led projects require supplemental analysis. Consultant may be asked to provide research, data analysis, and report writing in support of Transportation Authority policy analyses.

The above mentioned tasks are representative of needs in the coming three years – additional tasks to be determined are anticipated to be needed and not all tasks listed above will necessarily be produced under this contract in the next three years.

Attachment 2

Proposed Disadvantaged Business Enterprise Firms

| Prime Consultant | Sub-consultant | DBE Certification | Location |
|--------------------------|---|---------------------------|-------------------|
| Arup | Eisen Letunic | Women | Berkeley, CA |
| | Strategic Economics | Women | Berkeley, CA |
| | TJKM | Asian Subcontinent | Pleasanton, CA |
| | Transportation Analytics | Women | Oakland, CA |
| | | | |
| Iteris | Transportation Mobility Solutions, LLC | Women, Asian Subcontinent | San Marino, CA |
| | | | |
| Nelson\Nygaard | M Lee Corporation | Asian Pacific | San Francisco, CA |
| | Strategic Economics | Women | Berkeley, CA |
| | Ann Carey Consulting | Women | San Francisco, CA |
| | Daniller Consulting, Inc. | Women | San Francisco, CA |
| | | | |
| Stantec | Ann Carey Consulting | Women | San Francisco, CA |
| | Baymetrics | Women, Asian Pacific | El Cerrito, CA |
| | Dyett & Bhatia, Urban and Regional Planners | Asian Subcontinent | San Francisco, CA |
| | Silicon Transportation Consultants | Asian Pacific | Belmont, CA |
| | Strategic Economics | Women | Berkeley, CA |
| | Toole Design Group | Women | Silver Spring, MD |
| | W&S Solutions | Asian Pacific | Pleasanton, CA |
| | | | |
| WSP Parsons Brinckerhoff | Cambria Solutions | Hispanic | Sacramento, CA |
| | Convey | Women | Emeryville, CA |
| | Strategic Cities | Women | Oakland, CA |
| | Transportation Analytics | Women | Oakland, CA |