



# Memorandum

## AGENDA ITEM 9

**DATE:** January 20, 2022

**TO:** Transportation Authority Board

**FROM:** Rachel Hiatt - Deputy Director for Planning

**SUBJECT:** 02/08/2022 Board Meeting: Award Contracts to Ten Shortlisted Consultant Teams for a Three-Year Period, with an Option to Extend for Two Additional One-Year Periods, for a Combined Amount Not to Exceed \$3,000,000 for On-Call Transportation Planning Services, and Authorize the Executive Director to Negotiate Contract Payment Terms and Non-Material Contract Terms and Conditions

<p><b>RECOMMENDATION</b>    <input type="checkbox"/> Information    <input checked="" type="checkbox"/> Action</p> <ul style="list-style-type: none"> <li>• Award Contracts to Ten Shortlisted Consultant Teams for a Three-Year Period, with an Option to Extend for Two Additional One-Year Periods, for a Combined Amount Not to Exceed \$3,000,000 for On-Call Transportation Planning Services</li> <li>• Authorize the Executive Director to Negotiate Contract Payment Terms and Non-Material Contract Terms and Conditions</li> </ul> <p><b>SUMMARY</b></p> <p>On November 10, 2021, we issued a Request for Qualifications (RFQ) for on-call transportation planning services to support our 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 us to enlist the services of a broad range of transportation planning specialists on an on-call, task order basis. By the due date of December 15, 2021, we received sixteen Statements of Qualifications (SOQs) in response to the RFQ. Interviews were held between January 11 and 12, 2022. Based on this competitive selection process, the review panel, with participation from the San Francisco Municipal Transportation Agency (SFMTA) and the Transportation Authority, recommends the award of consultant contracts to the ten top-ranked teams: Alta Planning + Design Inc., Arup North America Ltd., Fehr &amp; Peers, Kittelson &amp; Associates Inc., McKinsey &amp; Company, Mott MacDonald Group, Inc., Nelson\Nygaard Consulting Associates, Inc., Parisi Transportation Consulting, Steer Group, and WSP USA, Inc.</p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Fund Allocation</li> <li><input type="checkbox"/> Fund Programming</li> <li><input type="checkbox"/> Policy/Legislation</li> <li><input type="checkbox"/> Plan/Study</li> <li><input type="checkbox"/> Capital Project Oversight/Delivery</li> <li><input type="checkbox"/> Budget/Finance</li> <li><input checked="" type="checkbox"/> Contract/Agreement</li> <li><input type="checkbox"/> Other: _____</li> </ul>
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## **BACKGROUND**

We are seeking on-call planning services to support our work program over the next three years. The establishment of contracts with one or more consultant teams will enable us to enlist the services of a broad range of transportation planning specialists on an on-call, task order basis. The current on-call planning contracts with Arup North America Ltd., Iteris, Inc., Nelson\Nygaard Consulting Associates, Inc., Stantec Consulting Services, Inc. and WSP USA, Inc. will expire May 31, 2022.

We have long-range countywide, neighborhood-scale, and project-level planning and policy advisory capabilities that stem from our multiple roles. As the Congestion Management Agency for San Francisco County, we conduct local and regional planning studies addressing congestion management, transportation system development, and urgent policy issues to advance key Board or Expenditure Plan priorities, particularly where multi-jurisdictional conditions exist.

## **DISCUSSION**

We are seeking 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:

- Transportation Planning
- Corridor and Area Planning Studies
- Travel Demand Management
- Neighborhood/Community Based Planning
- Policy Analysis and Research
- Outreach & Communications

The consultant scope of services is included in Attachment 1.

**Procurement Process.** We issued a Request for Qualifications (RFQ) for on-call transportation planning services on November 10, 2021. We held a pre-submittal conference on November 18, 2021, which provided opportunities for small businesses and larger firms to meet and form partnerships. Eighty-five firms registered for the conference.

We took steps to encourage participation from small and disadvantaged business enterprises, including advertising in seven local newspapers: the San Francisco Chronicle, the San Francisco Examiner, the San Francisco Bay View, Nichi Bei, the Small Business Exchange, El Reportero, and the World Journal. We also distributed the RFQ, registration list for the pre-submittal 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 December 15, 2021, we received sixteen SOQs in response to the RFQ. The selection panel evaluated the SOQs based on qualifications and other criteria identified in the RFQ, with an emphasis on bidders' management and technical capabilities and experience. In addition, the review panel evaluated each firm's strengths and weaknesses in each specialty area for which the firm sought consideration and reviewed the prime consultant's references. We held interviews with three qualified teams on January 11 and 12, 2022. Seven other qualified teams advanced without interviews due to the quality of the SOQs, prior working experience with us, and the familiarity of staff with previous work performed by these firms. Interviews were conducted by a selection panel comprised of



representatives from SFMTA and Transportation Authority staff. Based on the competitive process defined in the evaluation criteria of the RFQ document, the selection panel recommends awarding contracts to the ten highest-ranked firms: Alta Planning + Design Inc., Arup North America Ltd., Fehr & Peers, Kittelson & Associates Inc., McKinsey & Company, Mott MacDonald Group, Inc., Nelson\Nygaard Consulting Associates, Inc., Parisi Transportation Consulting, Steer Group, and WSP USA, Inc.

Given the wide range of desired proficiencies and experience, the amount and complexity of our 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 we may call upon on a task order basis. Such an arrangement is currently in place through our current on-call transportation planning contracts, which has proved beneficial to the agency's work program. The recommended firms together provide us with two or more options for each requested area of expertise. Details of each firm's areas of expertise and proposed subconsultants are included in Attachment 2.

Shortlisted 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. To maintain an open and competitive process, all shortlisted consultants will be invited to submit proposals and/or participate in oral interviews as part of the task order negotiation process. While we intend 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 \$450,000, in other words 15% of total contract value, 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 an overall Disadvantaged Business Enterprise (DBE) goal of 12%, accepting certifications by the California Unified Certification Program. SOQs from all ten teams met or exceeded the DBE goal. In addition, we will establish DBE, Small Business Enterprise, and/or Local Business Enterprise goals for each subsequent task order request, based on the project's funding sources and specific scope of work. All ten prime consultants' firms are headquartered in states not on the Banned State List, which are states with laws restricting abortion access or discriminate against LGBT individuals.

## **FINANCIAL IMPACT**

The scope of work and first year's activities described in the RFQ are included in the Transportation Authority's adopted Fiscal Year 2021/22 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 City and County of San Francisco, and Prop K sales tax funds. Sufficient funds will be included in future fiscal year budgets to cover the cost of these contracts.

## **CAC POSITION**

The Community Advisory Committee will consider this item at its January 26, 2022 meeting.



## **SUPPLEMENTAL MATERIALS**

- Attachment 1 - On-Call Planning Services Scope of Work
- Attachment 2 - Shortlisted Respondents per Areas of Expertise
- Attachment 3 - Existing On-Call Bench Task Orders

## Attachment 1

### On-Call Transportation Planning Services

#### Scope of Work

The Transportation Authority require varying types and levels of project management and project development support in the following areas:

1. **San Francisco Transportation Plan (SFTP)/Countywide Planning:** The Transportation Authority regularly updates the long-range countywide transportation plan that serves as the city's blueprint for transportation system development and investment over 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.
2. **Congestion Management Program (CMP):** The Transportation Authority prepares biennial updates to the CMP and multimodal Level of Service (LOS) monitoring on the CMP network. This LOS Monitoring work is supported by a separate CMP Monitoring contract.
3. **Neighborhood Transportation Plan (NTIP) Planning Studies:** The Transportation Authority routinely conducts neighborhood planning efforts under the Prop K NTIP program. These efforts are prioritized by the District Supervisor to address activities that improve pedestrian and/or bicycle safety, encourage walking and/or biking, improve transit accessibility, and/or improve mobility for Equity Priority Communities (formerly known as Communities of Concern) or other underserved neighborhoods and vulnerable populations (e.g., seniors, children, and/or people with disabilities).
4. **Policy Studies:** Policy studies address a range of current transportation policy topics including parking, technology-enabled transportation, transportation demand management, and others. Each study is intended to provide recommendations to the Board on a specific issue of interest or concern and typically involves research, data collection, analysis and report writing.
5. **Corridor and Area Planning Studies:** The Transportation Authority prepares and reviews transportation planning studies. These may include planning for transit (including ferries), managed lanes, and street design to address Vision Zero goals. One or two new studies are typically 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, or MTC) and Link 21 (led by the San Francisco Bay Area Rapid Transit District).

The Transportation Authority seeks transportation planning consultant services to support the various projects described above, and others that may arise. A list of six general areas of expertise sought in prospective teams is provided below, lettered A through F. In addition to these areas of expertise, all teams must demonstrate skills and experience in project management (scope, schedule, and budget management) and supporting technical skills that may be used across multiple areas.

- A. **Transportation Planning** - Including countywide or neighborhood planning focused on development and evaluation of transportation networks. Specific examples include:

- a. Citywide planning. Support development of future updates to the SFTP, including identifying long range needs, analyze tradeoffs across transportation projects and programs, coordinating with partner agencies, and other related tasks.
- b. Modal Network planning. Conduct planning and design for modal networks, including pedestrian and bicycle network planning, transit network and service planning, street network planning, and similar modal studies.
- c. Travel Market Analysis. Conduct analysis of specialized travel markets to address trips in San Francisco occur outside of the standard morning and evening peak periods or for non-commute purposes. The Transportation Authority may seek consultant assistance in developing specialized policies or service solutions to address the needs of 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.

**B. Corridor and area planning studies** - Develop studies of specific multimodal transportation investments, including potentially:

- a. Development of transportation options in a corridor
- b. Concept design and evaluation
- c. Preparation of Strategic, Preliminary, and Final Business Case analyses of proposed investments and supporting technical analysis and documentation
- d. Major investment studies, alternatives analysis, project planning, and project development for major transit projects
- e. Bus and rail operational planning, system planning, and network design
- f. Transit facility / site planning
- g. Transit station area planning at select locations, including demand analysis, station area planning, and similar activities
- h. Transit and multimodal corridor planning including design options and operations
- i. California Environmental Quality Act/National Environmental Policy Act

**C. Travel Demand Management (TDM)** - TDM policy analysis, stakeholder facilitation, program design, implementation support, and/or project evaluation services. The below is a list of potential areas of support:

- a. Development of TDM strategy at city, neighborhood, or development scale
- b. Development conditions/approval policy
- c. Strategies for managing existing development, including pricing and incentives
- d. Information/marketing/education
- e. Parking management program design
- f. Incentives - the planning, design, and/or deployment of software in support of programs such as travel incentives and rebates, travel behavior monitoring, and user information.
- g. Payment Technology
- h. Coordination with local, state, and federal agencies (e.g., the MTC, the California Department of Transportation, Federal Transit Administration, or Federal Highways Administration)
- i. Monitoring and evaluation

- D. Neighborhood/Community Based Planning** - Support Transportation Authority led community, neighborhood, and small area planning, in support of NTIP and Community-Based Transportation Plan development. Tasks may include:
- a. Neighborhood-scale modal planning to identify and evaluate strategies to advance the city's transit first/mode choice, safety, and equity goals
  - b. Small area studies that examine travel patterns and potential transportation improvements
- E. Policy Analysis and Research** - Develop and evaluate transportation policies in key areas such as:
- a. Toll and pricing policy development and evaluation
  - b. Identify and research innovative technologies and concepts
  - c. Support scoping, planning, and project development related to connected vehicles and/or automated vehicle technology
  - d. Market analysis and/or transportation business plan development
  - e. Develop governance models and assumptions
  - f. Economic impact analysis
  - g. Fiscal and financial analysis
  - h. Equity analysis
  - i. Funding strategy development for major transit projects
- F. Outreach & Communications** - Support outreach and communications for Transportation Authority planning projects. This may include support as part of a planning project in another category or communications-specific support where other project elements are not requested. Task support in this area may include:
- a. Strategic communication
    - i. Messaging development
    - ii. Communications development
  - b. Outreach
    - i. Strategy development
    - ii. Community involvement
    - iii. Facilitation
    - iv. Organize stakeholder groups
    - v. Develop and lead co-creation events
    - vi. Multi-media (electronic and non-electronic) outreach methods
  - c. Translation, interpretation
  - d. Visualization

While the Transportation Authority is seeking support for several specific topical areas, we will require a broad set of skills that would be used in any task order. Specifically:

- **Project Management** - Ability to manage project and/or program scopes, schedules, and budgets.
- **Modeling/Data Analysis** - Most planning studies will involve some level of data collection and analysis and may require modeling.
  - 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
- **Design and Cost Estimation** - Many planning studies, modal and corridor studies in particular, will require some level of concept design and cost estimation.
  - a. Conceptual design through 30% design engineering
  - b. Conceptual street/streetscape design
  - c. Planning level cost estimation

**Attachment 2  
Shortlisted Respondents  
On-Call Transportation Planning Services**

No.	Prime Consultant	Areas of Expertise						Subconsultants
		Transportation Planning	Corridor and Area Planning	Travel Demand Management	Neighborhood / Community Based Planning	Policy Analysis and Research	Outreach and Communications	
1	Alta Planning + Design Inc.	X	X	X	X	X	X	Civic Edge Consulting, LLC (DBE/SBE/LBE) Hexagon Transportation Consultants, Inc. Jacobs Engineering Group, Inc. Safe Streets Research and Consulting (DBE) *
2	Arup North America Ltd	X	X	X	X	X	X	Access Planning AutoCase Advisory Services CHS Consulting Group (DBE/SBE/LBE) Civic Edge Consulting, LLC (DBE/SBE/LBE) Strategic Economics (DBE/SBE)
3	Fehr & Peers	X	X	X	X	X	X	Adavant Consulting (SBE/LBE) AGS, Inc. (SBE) Civic Edge Consulting, LLC (DBE/SBE/LBE) LCW Consulting (DBE/LBE) * MSA Design & Consulting, Inc. (SBE/LBE) Safe Streets Research and Consulting (DBE) * Sertior (SBE/LBE) * Telamon Engineering Consultants, Inc. (DBE/SBE/LBE) * WILTEC (DBE)
4	Kittelson & Associates Inc.	X	X	X	X	X	X	Circlepoint (SBE) Foursquare Integrated Transportation Planning (DBE) Toole Design Safe Streets Research and Consulting (DBE) Strategic Economics, Inc.(DBE/SBE)
5	McKinsey & Company	X				X	X	Intueor Consulting, Inc. (DBE/SBE) Motive Power, Inc. (SBE)
6	Mott MacDonald Group	X	X	X	X	X	X	ACUMEN Building Enterprise, Inc. (DBE/SBE) Circlepoint (SBE) Elite Transportation Group, Inc. (DBE/SBE) GHT Capital LLC (DBE/SBE) * Leading Mobility Next Steps Marketing, Inc. (DBE/SBE/LBE) Whitlock & Weinberger Transportation (DBE/SBE) *

Abbreviations:

DBE: Disadvantaged Business Enterprise  
SBE: Small Business Enterprise  
LBE: Local Business Enterprise

\* New DBE/SBE/LBE subconsultant firms within the last 5 years.

No.	Prime Consultant	Areas of Expertise						Subconsultants
		Transportation Planning	Corridor and Area Planning	Travel Demand Management	Neighborhood / Community Based Planning	Policy Analysis and Research	Outreach and Communications	
7	Nelson\Nygaard Consulting Associates	X	X	X	X	X	X	Access Planning Chaudhary & Associates, Inc. (DBE/SBE) Civic Edge Consulting, LLC (DBE/SBE/LBE) CivicMakers, LLC (SBE/LBE) * Ewald & Wasserman Research Consultants, LLC (SBE/LBE) * InterEthnica (SBE/LBE) Jacobs Engineering Group, Inc. JMA Civil, Inc. (SBE) * M Lee Corporation (DBE/SBE/LBE) MSA Design & Consulting Inc. (SBE/LBE) Resource Systems Group, Inc. Ross & Baruzzini Sam Schwartz Engineering DPC Silicon Transportation Consultants (DBE/SBE) Strategic Economics (DBE/SBE) Transportation Analytics (DBE/SBE) VST Engineering Inc. (DBE) *
8	Parisi Transportation Consulting	X	X	X	X	X	X	Ronny Kraft Consulting (DBE/LBE) Safe Streets Research & Consulting (DBE) *
9	Steer Group	X	X	X		X	X	ARTEMIA Communications, Inc. (SBE/LBE) * GHT Capital (DBE/SBE) *
10	WSP USA, Inc.	X	X	X	X	X	X	Civic Edge Consulting, LLC (DBE/SBE/LBE) EMC Research Jay Primus Transportation Analytics (DBE/SBE) Urban Field Studio (DBE/LBE) *
	<b>Total Firms Shortlisted by Areas of Expertise</b>	<b>10</b>	<b>9</b>	<b>9</b>	<b>8</b>	<b>10</b>	<b>10</b>	

Abbreviations:

DBE: Disadvantaged Business Enterprise  
SBE: Small Business Enterprise  
LBE: Local Business Enterprise

\* New DBE/SBE/LBE subconsultant firms within the last 5 years.

**Attachment 3:  
On-Call Transportation Planning Task Orders (2016-2022)**

<b>Prime Consultant</b>	<b>Task Order Description</b>	<b>Task Order Amount</b>	<b>Subconsultant(s)</b>	<b>Amount to Subconsultants</b>
Arup N. America, Ltd.	Downtown Extension	\$554,305	Access Planning	\$44,000
			Jacobs/CH2M Hill	\$34,874
			Strategic Economics (DBE, SBE)	\$30,000
	Geary Bus Rapid Transit Project	\$413,912	Circlepoint (SBE)	\$404,117
	TIMMA Mandatory Transit Pass Study	\$179,203	Jacobs/CH2M Hill	\$171,790
	Lombard Crooked Street Reservations and Pricing Study	\$106,679	Fall Line Analytics (LBE)	\$5,000
	San Francisco Transportation Task Force	\$10,147	Eisen/Letunic (DBE)	\$9,219
	San Francisco Transportation Plan	\$39,903		
<b>Total Task Orders Awarded to Arup N. America, Ltd.</b>		<b>\$1,304,149</b>		<b>\$699,000</b>
Iteris, Inc.	N/A	\$0		
<b>Total Task Orders Awarded to Iteris, Inc.</b>		<b>\$0</b>		<b>\$0</b>
Nelson\Nygaard Consulting Associates	ConnectSF / San Francisco Transportation Plan	\$275,000	Cambridge Systematics	\$38,438
			Civic Edge Consulting (DBE, LBE, SBE)	\$93,243
	TIMMA Travel Demand Management and Transportation Affordability Program	\$168,673	Ann Carey Consulting (DBE, LBE)	\$20,394
	Vision Zero Ramp Intersections Study Phase II Planning Services	\$106,532	Parisi Transportation Consulting (SBE)	\$92,604

Prime Consultant	Task Order Description	Task Order Amount	Subconsultant(s)	Amount to Subconsultants
Nelson\Nygaard Consulting Associates			Ronny Kraft Consulting (DBE, LBE)	\$10,500
	Golden Gate Park - JFK Drive Access Equity Study	\$100,000	Civic Edge Consulting (DBE, LBE, SBE)	\$32,722
			En2Action	\$15,000
	Octavia Improvements Study	\$100,000	Civic Edge Consulting (DBE, LBE, SBE)	\$20,051
			Parisi Transportation Consulting (SBE)	\$74,068
	Sales Tax Reauthorization Outreach	\$70,000	Civic Edge Consulting (DBE, LBE, SBE)	\$45,963
			En2Action	\$21,155
	District 10 Mobility Management Study	\$69,975		
	Lombard Crooked Street Reservations and Pricing Study Outreach Services	\$34,622	Civic Edge Consulting (DBE, LBE, SBE)	\$29,299
			InterEthnica (LBE, SBE)	\$2,700
Alemanly Interchange Improvement Study	\$33,526			
BART Travel Incentives Program	\$2,250	Elham Shirazi (DBE)	\$2,250	
<b>Total Task Orders Awarded to Nelson\Nygaard Consulting Associates</b>		<b>\$959,578</b>		<b>\$498,388</b>
Stantec Consulting Services, Inc.	Treasure Island Mobility Management Agency Program	\$597,744	Jay Primus	\$41,880
			CDM Smith	\$23,818
<b>Total Task Orders Awarded to Stantec Consulting Services, Inc.</b>		<b>\$597,744</b>		<b>\$65,698</b>
WSP USA, Inc.	Technology Enabled Transportation	\$35,414		

<b>Prime Consultant</b>	<b>Task Order Description</b>	<b>Task Order Amount</b>	<b>Subconsultant(s)</b>	<b>Amount to Subconsultants</b>
	Emerging Mobility Pilot Framework	\$20,707		
	Transportation Network Company Research	\$8,187	Strategic Cities	\$6,538
	Commuter Shuttles Hub Study	\$2,247		
<b>Total Task Orders Awarded to WSP</b>		<b>\$66,555</b>		<b>\$6,538</b>
<b>Total Task Orders Awarded to Date</b>		<b>\$2,928,026</b>		
<b>Total Task Orders Allocated to Subconsultants (43%)</b>				<b>\$1,269,624</b>
<b>Total Task Orders Awarded to Disadvantaged Business Enterprise Firms (10%)</b>				<b>\$293,641</b>
<b>Total Task Orders Awarded Local Business Enterprise Firms (9%)</b>				<b>\$259,872</b>
<b>Total Task Orders Awarded to Small Business Enterprise Firms (28%)</b>				<b>\$824,767</b>
<b>Total Contract Amount</b>				<b>\$3,800,000</b>