

# MEMO

**Date:** February 11, 2011

**To:** Marco Anderson, Associate Regional Planner (Project Manager)  
**cc:** Proposal Review Committee

**From:** Laura Aguilar, Contracts Administrator

**Re:** Proposal Summary Memo for Request for Proposal (RFP) 11-001-BR06  
City of Moreno Valley: Alessandro Boulevard Corridor Implementation Project

**Proposal Evaluation Forms must be completed by 9:00 am on February 23, 2011, and submitted to Laura Aguilar via email ([aguilarl@scag.ca.gov](mailto:aguilarl@scag.ca.gov)), or facsimile (213- 236-1825).**

**Evaluation must be completed by: February 24, 2011 (Meeting Date)**

A bid alert notice for the subject RFP was emailed to 58 prequalified firms. The following firms responded to the RFP:

Cost Estimate - \$151,850

<b>Firm Name</b>	<b>Proposed Cost</b>	<b>Conflict of Interest (COI)</b>
1. Prime: Gruen Associates Sub: Iteris, Inc. Sub: Terry A. Hayes & Associates, Inc.	\$191,800	None
2. Prime: Mooney Planning Collaborative Sub: Roesling Nakamura Terada (RNT) Sub: Linscott Law & Greenspan (LLG)	\$136,955	None
3. Prime: Raimi + Associates Sub: Fehr and Peers Sub: Metropolitan Research & Economics Sub: Impact Sciences	\$165,032	None
4. Prime: RBF Consulting Sub: Ryan Snyder Associates Sub: Metropolitan Research & Economics	\$166,888	Prime: See COI Form #5, Contribution

### **Important Instructions to the Proposal Review Committee (PRC)**

- All individuals on the PRC must sign SCAG's Non-Disclosure/Conflict of Interest form (attached).
- PRC shall review all the proposals received and rate them using the Proposal Evaluation Score Sheet (attached) included in the RFP. Contracts Administrator shall rank them according to the highest average score received.
- PRC may invite all the firms for an interview or may choose to invite only the top three or four firms with the highest-ranking proposal.
- Respective Contracts Administrator will provide instructions and guidance to PRC, prior to conducting the interviews.

- Original score sheets, and original Non Disclosure/Conflicts of Interest must be provided to the Contracts Administrator.
- Copies of each proposal and all back-up materials must be returned to the Contracts Administrator.
- Do **NOT** disclose to any firm which firm has been recommended for the award.
- Do **NOT** authorize the selected consultant to begin work until a Task Order between SCAG and the consultant has been fully executed.

February 11, 2011

**TO:** Members of the Proposal Review Committee

**FROM:** Laura Aguilar, Contracts Administrator

**SUBJECT:** Evaluation of Proposals for RFP No. 11-001-BR06  
City of Moreno Valley: Alessandro Boulevard Corridor Implementation Project

As members of the Proposal Review Committee (PRC) for RFP No. 11-001-BR06, it is your responsibility to evaluate proposals, interview the offerors, and make an award recommendation.

The goal of the evaluation is to demonstrate a clear justification for the contract award recommendation. Your judgment must be in written form and clearly convey your opinion of the value of each offerors' proposal. Simply providing points for each category will not suffice. You must provide written rationale to support your score/points under the "**Comment**" section of the evaluation form. The written comments shall support your reasoning and the points given. Your efforts will be the official record of the evaluation and selection process and would be used in the event of a protest.

Keep in mind that all written records may be obtained through the Public Records Act, California Government Code 6253.

The evaluation process is significant and requires a thorough evaluation to ensure that the most qualified offeror has been chosen for the project. To help facilitate your review, a set of evaluation requirements have been established and are attached.

Thank you for your participation in the evaluation of this project. If you should have any questions regarding the evaluation process or any of the requirements, please contact me at (213) 236-1922.



# PROPOSAL EVALUATION REQUIREMENTS

## ETHICS

Each PRC member must sign a statement that they are free from actual or potential personal conflicts of interest (COI) and certify that they will refrain from unauthorized disclosure of information pertaining to the procurement (see attached Proposal Review Committee Member Non-Disclosure/Conflict of Interest Statement). It should be emphasized that if a PRC member has a personal relationship with any of the offerors, they must completely excuse themselves from the PRC.

Throughout the procurement process, PRC members are not to discuss any aspect of an offeror's proposal or evaluation with anyone other than the Contracts Administrator, other PRC members, or a legal advisor. Inquiries from individuals external to the PRC must be referred directly to the Contracts Administrator. This includes basic questions about the status of the procurement, which offerors are going to be interviewed, etc.

Each offeror's identity and proposal contents must be treated with the utmost discretion to avoid compromising the evaluation results or giving any one offeror an unfair competitive advantage. Proposals and evaluation materials must never be left in plain view of others (e.g., sitting atop one's desk overnight). When not in use, all evaluation-related materials must be locked away in a secure place.

## EVALUATION PROCESS

After dissemination of the proposals by the Contracts Administrator, each member of the PRC must:

1. Sign member name on the top page of each proposal
2. Independently evaluate and score each proposal in accordance with the proposal evaluation form included in the Request for Proposal (RFP). Determine *why* and/or *how* an offeror fulfilled or met the evaluation criteria.
3. Mark-up (e.g., highlight, underline, circle, etc.) the proposals, as necessary, during the review.
4. Record the strengths, weaknesses, and risks of each offeror. Avoid the tendency to interpret the meaning of the offeror's proposal when the writing is ambiguous. Clarification of ambiguities can always be requested during the interview process.
5. Consider only what is between the covers of the proposal and what is relayed during the interview. Do not allow personal knowledge of a particular offeror or individual to affect your evaluation. If you have reason to question the accuracy of an offeror's statement, inquire about it during the interview.

6. Evaluate corporate experience only. Focus strictly on the scope of the offeror's experience doing similar work and not on how well they performed on previous jobs.

For example: Do the principals of the firm have experience in travel demand forecasting? How many years of experience? Does the proposal contain evidence of the offeror's ability to manage staff and subcontractors on the same order of magnitude as the project at hand?

A common source of confusion stems from two areas, corporate experience and past performance. Corporate experience pertains to the type and amount of work previously performed by an offeror, while past performance relates to "quality" and how well an offeror has performed.

7. Assign a numerical score to each criterion.

It is essential that all written comments fully support the score assigned. It is not enough to write, for example, "good understanding of the concept." That statement is insufficient without an example. Comments must be supported by using examples directly out of the proposal, and referencing pages.

If the proposal has failed to meet the requirements specified in the RFP, score the proposal accordingly. In some cases, this might mean assigning a score of "0" to a particular criterion and writing "fails to meet the RFP requirements" in the comment block.

8. Identify at least two standard questions to be asked during the interview phase. The questions should be provided to the Contracts Administrator along with the other paperwork at the collaboration of evaluations meeting.

## **COLLABORATION OF EVALUATIONS**

Once the independent proposal evaluations have been completed, PRC members must meet with Contracts Administrator to discuss and average the individual scores and decide which offerors will be invited for an interview.

While it is strongly recommended that members attend this session in person, teleconferencing should be made available in those rare instances when extenuating circumstances prevent someone from attending.

It is especially important for members to have adequate opportunity to explain why their overall score for a given offeror is markedly different than those of the others. Sometimes, the arguments are convincing and influential enough that other members feel it is warranted to either upgrade or downgrade their own scores in light of the new information.

Members should feel free to change their scores based on the discussions that take place. Members must document the change on their score sheet by recording *why* the change was made and *which* evaluation criterion (a) was impacted.

For example: "On 4/3/08, I changed Consultant, Inc.'s score for Technical Approach from 28 to 20, based on the various reservations and pitfalls raised by several PRC members during the

Proposal Evaluation meeting. I overlooked these things in my own evaluation.” Members must then initial such statements.

The Contracts Administrator will average the scores using a straight average (i.e., adding the individual scores together and dividing the sum by the total number of evaluators) and record the results on a separate sheet.

Discuss what threshold to use for deciding which offerors should be interviewed. For instance, the PRC may decide to interview only those offerors receiving an averaged score of 75 or higher.

### **INTERVIEW PHASE (If Applicable)**

The compiled standard interview questions should be discussed prior to the start of the first interview.

Decide which ones should be kept, deleted, or modified. Members are free to ask proposal-specific questions as well during the interviews. However, these questions do not need to be provided to the Chairperson ahead of time. Only the standard interview questions are compiled ahead of time.

The interviews must be conducted using the standard interview questions and the interview evaluation form included in the RFP.

At the conclusion of the interviews, PRC members must convene to discuss the interview scores in the same fashion as was done for the proposal evaluations.

The Contracts Administrator will average the individual interview scores and then combine them with the averaged proposal evaluation scores to determine the overall score for each offeror. Based on the overall scores, the PRC members shall collectively decide who will be recommended for award of the contract, usually the offeror with the highest overall score.

### **RETENTION OF SUPPORT DOCUMENTATION**

After conclusion of the evaluations and submission of the award recommendation memorandum, PRC members must ensure that all original evaluation sheets, proposals, standard interview questions, and other procurement-related information have been turned over to the Contracts Administrator for inclusion in the official contract file.

## **CONTRACTS ADMINISTRATOR RESPONSIBILITIES:**

1. Prior to convening the Proposal Review Committee (PRC), collect the Non-Disclosure Agreement from each PRC member.
2. Dissemination of the proposals to each member of the PRC.
3. Scheduling of date, time, and location of the proposal evaluations meeting (should be held one week prior to the scheduled interview date). Anticipate the meeting to be approximately 2-3 hours in length, depending on the number of proposals received. If outside members cannot attend in person, this can be held as a tele-conference meeting.

It is best to start off the meeting by displaying on a flip chart, writing board, chalk board, etc. everyone's overall proposal evaluation score for each offeror.

The members can then proceed with discussing all of the proposals received, sharing their thoughts and opinions on what they consider to be the strengths, weaknesses, and risks of each offeror.

4. Scheduling of date, time, and location of the interview phase.
5. Verbally notify offerors, as soon as possible, of the date and time of their scheduled interview. Follow-up with email confirmation. Notification is not necessary to those offerors that will not be interviewed.
6. At the close of the proposal evaluation meeting, collect the following from each member:
  - Original evaluation forms
  - Marked-up proposals
  - Signed and dated Proposal Review Committee Member Non-Disclosure/Conflict of Interest Statement.

Members are permitted to retain copies of their evaluation forms if so desired.

7. After the conclusion of the interviews, write the award recommendation using the Memorandum of Selection form provided. The memorandum must:
  - Be signed by each PRC member.
  - Be given to the Contracts Administrator after completion of the interviews in order to give Contracts sufficient time to comply with the requirements of SCAG's Policy on Contract Award Protests.

If the offeror being recommended for contract award is not the highest-ranked offeror, a detailed explanation must be given. At no time is the Project Manager or any other PRC member to notify the chosen offeror that they are being recommended for award. This is the Contracts Administrator's responsibility and is handled via a Notice of Intent to Award letter, which is usually issued to all offerors within 2 workdays after completion of the interviews.

8. Evaluate past performance.

This is done only after an offeror has been recommended by the PRC. If the CA deems it necessary, the CA will contact the references listed in the offeror's proposal to obtain the necessary past performance feedback. If the feedback is unsatisfactory, the CA will ask the PRC Chairperson to issue a new award memorandum recommending the offeror rated second highest by the PRC.

If the offeror originally recommended by the PRC was not the highest-ranked offeror, the the CA with the PRC Chairperson must convene a teleconference with the other PRC members to decide the second most qualified offeror.

**MEMORANDUM (Sign & Return to Contracts)**

**DATE:** \_\_\_\_\_

**TO:** Laura Aguilar, Contracts Administrator

**FROM:** \_\_\_\_\_ (print your name)

**SUBJECT:** Proposal Review Committee Member Non-Disclosure/Conflict of Interest Statement for RFP No. 11-001-BR06, City of Moreno Valley: Alessandro Boulevard Corridor Implementation Project

Proposers:

<b>Gruen Associates</b>	_____
<b>Mooney Planning Collaborative</b>	_____
<b>Raimi + Associates</b>	_____
<b>RBF Consulting</b>	_____
_____	_____
_____	_____
_____	_____
_____	_____

By signing this statement, I am certifying that throughout the selection process for this procurement I will not disclose or discuss with anyone outside the Proposal Review Committee (PRC) any information (including proprietary or other confidential information) provided in any proposal received, reviewed, or discussed by the PRC.

I am also certifying that, to the best of my knowledge regarding the above offerors (including the proposed subcontractors), neither I nor any member of my family has any direct financial or personal (e.g., being friends with one of the offerors) interest which conflicts substantially, or appears to conflict substantially, with my duties as a member of the PRC. I also certify that I am not negotiating for, nor have I made arrangements concerning future employment with any of the offerors or proposed subcontractors. In the event that I later become aware of a conflict of interest, I agree to immediately recuse myself from the procurement, report the matter to the Contracts Administrator, and abide by any further instructions she/he may provide me.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

If you are unable to sign this statement because you believe that there is a potential or actual conflict of interest that may result in contracting with any of the offerors, please describe the nature of the potential or actual conflict of interest:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Consultant Selection Form

## RFP No. 11-001-BR06

(SCAG PM- complete Sections A – D and return the entire document to Contracts)

A). **Project Title** City of Moreno Valley: Alessandro Boulevard Corridor Implementation Project

The Proposal Review Committee (PRC) evaluated each offer in an objective and unbiased manner, and in accordance with the evaluation criteria set forth in the Request for Proposal (RFP). The members of the PRC do not have a conflict of interest in regards to this RFP. The PRC reached a consensus for the selection, and recommend awarding the contract to the offeror indicated below, as being the most advantageous and of the best value to SCAG.

B). **Selected/Recommended Offeror:** \_\_\_\_\_

C). **PRC Members:**

① Name: Marco Anderson Job Title: Associate Regional Planner

Signature: \_\_\_\_\_ Employer: SCAG

② Name: John Chiu Job Title: Community Planner/Contract Manager

Signature: \_\_\_\_\_ Employer: Caltrans

③ Name: Eric Lewis Job Title: City Traffic Engineer

Signature: \_\_\_\_\_ Employer: City of Moreno Valley

④ Name: Claudia Manrique-Miklusek Job Title: Associate Planner

Signature: \_\_\_\_\_ Employer: City of Moreno Valley

⑤ Name: John Terell Job Title: Planning Official

Signature: \_\_\_\_\_ Employer: City of Moreno Valley

⑥ Name: \_\_\_\_\_ Job Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Employer: \_\_\_\_\_

⑦ Name: \_\_\_\_\_ Job Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Employer: \_\_\_\_\_

**D). Basis for Selection** - Check all that apply and if necessary, attach additional sheet(s) to provide additional specifics (FYI – The PM can copy this section for the Board Report [DOC #65115] for this contract award).

**The PRC determined that the selected/recommended offeror:**

- Is responsive to the solicitation (i.e., met all the requirements).
- Is responsible in that they demonstrated capability to perform successfully under the terms and conditions proposed (consideration will be given to such matters as offeror integrity, compliance with public policy, record of past performance, and financial and technical resources). *Contracts - Check references if 1<sup>st</sup> time consultant with SCAG.*
- Quoted the lowest most realistic price to perform all the scope of work. ***If The selected consultant did not propose the lowest price, you must address why the PRC made the selection. The bigger the variance the more justification***

(Sample language includes: Other firms proposed lower prices but did not propose a technical approach that fully met the RFP scope [ provide any specifics] and did not demonstrate the familiarity and breadth of experience as did the selected consultant).

- Other firm(s) proposed a lower price(s) but the PRC awarded the contract to the selected consultant because, **(provided specifics - for example,** the lower price firm did not demonstrate the familiarity and breadth of experience as did the selected consultant, specifically in \_\_\_\_\_ area...; or did not propose a technical approach that fully met the RFP scope, specifically \_\_\_\_\_); or although the price proposed was not the lowest, it was in the range of what the PRC determined it would take to meet the required deliverables, and the selection of **TBD** provided the best overall value to SCAG given the reasons mentioned below.

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- Demonstrated the most comprehensive and broadest range of services and solutions that will meet SCAG's requirements. **Specifically,**

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- Demonstrated the best understanding of the proposed scope of work and the key elements involved. **Specifically,**

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- Demonstrated the most extensive experience with projects of similar size and scope. **Specifically,**

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- Was able to respond with specific sets of actions that they would take to complete the deliverables detailed in the scope of work **which was lacking in the responses of others** (delete if not relevant). **Specifically,**

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- Demonstrated the most creative/innovative/effective (circle as many as apply) approach to meet SCAG's requirements. **Specifically,**

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Other (**Specify**) *Recognized by \_\_\_ for \_\_\_*

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The PRC determined that none of the offerors were responsive to the solicitation (i.e., met all the requirements), and therefore rejected all proposals.

Other offers (specify) quotes were unrealistically low in terms of (specify):

# PROPOSAL EVALUATION FORM

**RFP No. 11-001-BR06**

Compass Blueprint Demonstration Project    Alessandro Boulevard Corridor Implementation Project

Project/Partner Jurisdiction    City of Moreno Valley

Consultant Name: \_\_\_\_\_

<i><b>Evaluation Criteria</b></i>	<b>Max. Possible Points</b>	<b>Points Earned</b>	<b>Comments</b>
<b><u>TECHNICAL APPROACH</u></b> <ul style="list-style-type: none"> <li>• Tasks &amp; approach clearly described</li> <li>• Creative/innovative approach</li> <li>• Project intent has been met</li> </ul>	<b>30</b>		
<b><u>CONSULTANT FIRMS:</u></b> <u>Prime Consultant:</u> <ul style="list-style-type: none"> <li>• Familiar with regional &amp; local issues</li> <li>• Experience with similar project of the same size and scope</li> </ul> <u>Sub-Consultants (if any):</u> <ul style="list-style-type: none"> <li>• Each sub provides unique service(s) to the team</li> <li>• Subs are fully capable of performing their tasks</li> </ul>	<b>30</b>		
<b><u>PROJECT MANAGEMENT</u></b> <ul style="list-style-type: none"> <li>• Qualifications of key individuals</li> <li>• Time commitment of key individuals</li> </ul>	<b>20</b>		
<b><u>PROJECT COST</u></b> <ul style="list-style-type: none"> <li>• Realistic cost for services to be performed</li> </ul>	<b>20</b>		
<b><u>REFERENCES</u></b> <ul style="list-style-type: none"> <li>• Similar projects completed on time and within budget</li> </ul>	<b>Pass/ Fail</b>		
<b><u>TOTAL</u></b>	<b>100</b>		

Name of Evaluator (print): \_\_\_\_\_ Agency: \_\_\_\_\_

Signature of Evaluator: \_\_\_\_\_ Date: \_\_\_\_\_

# INTERVIEW EVALUATION FORM

RFP No. 11-001-BR06

Compass Blueprint Demonstration Project    Alessandro Boulevard Corridor Implementation Project

Project/Partner Jurisdiction    City of Moreno Valley

Consultant Name: \_\_\_\_\_

<i><b>Evaluation Criteria</b></i>	<b>Max. Possible Points</b>	<b>Points Earned</b>	<b>Comments</b>
<b><u>TECHNICAL APPROACH</u></b> <ul style="list-style-type: none"> <li>• Tasks &amp; approach clearly described</li> <li>• Creative/innovative approach</li> <li>• Project intent has been met</li> </ul>	<b>30</b>		
<b><u>CONSULTANT FIRMS:</u></b> <u>Prime Consultant:</u> <ul style="list-style-type: none"> <li>• Familiar with regional &amp; local issues</li> <li>• Experience with similar project of the same size and scope</li> </ul> <u>Sub-Consultants (if any):</u> <ul style="list-style-type: none"> <li>• Each sub provides unique service(s) to the team</li> <li>• Subs are fully capable of performing their tasks</li> </ul>	<b>30</b>		
<b><u>PROJECT MANAGEMENT</u></b> <ul style="list-style-type: none"> <li>• Qualifications of key individuals</li> <li>• Time commitment of key individuals</li> </ul>	<b>20</b>		
<b><u>PROJECT COST</u></b> <ul style="list-style-type: none"> <li>• Realistic cost for services to be performed</li> </ul>	<b>20</b>		
<b><u>REFERENCES</u></b> <ul style="list-style-type: none"> <li>• Similar projects completed on time and within budget</li> </ul>	<b>Pass/ Fail</b>		
<b><u>TOTAL</u></b>	<b>100</b>		

Name of Evaluator (print): \_\_\_\_\_ Agency: \_\_\_\_\_

Signature of Evaluator: \_\_\_\_\_ Date: \_\_\_\_\_