



## Board Report

File #: 2018-0025, File Type: Contract

Agenda Number: 23.

### EXECUTIVE MANAGEMENT COMMITTEE MARCH 15, 2018

**SUBJECT: METRO TALENT DEVELOPMENT BENCH**

**ACTION: AWARD BENCH CONTRACTS**

#### **RECOMMENDATION**

AUTHORIZE the Chief Executive Officer to:

- A. AWARD four-year, fixed rate task order based bench Contract Nos. PS45898000 through PS45898010, with the following firms: Grawbowski Collaborative Consulting, Insight Strategies, Inc., Kaygen Inc., Lopez and Company, LLP., MilliMicro Systems Inc., Newleaf Training and Development, OGX Consulting, Organic Communications, LLC., PROTRANS, Cynthia M. Ruiz & Associates, and The Greg Group, for Talent Development Services, for a not-to-exceed amount of \$931,054 for the two-year base term effective April 1, 2018 through March 31, 2020, plus \$465,526 for each of the two, one-year options, for a combined total amount not-to-exceed \$1,862,106, subject to resolution of protest(s) if any; and
- B. EXECUTE Task Orders under these Contracts for Talent Development services in a total amount not-to-exceed \$1,862,106.

#### **ISSUE**

Metro's Talent Development department leads employee development programs that include professional skills development and leadership development programs. The award of these bench contracts will serve to complement existing in-house staff in providing specialized training as needed.

#### **DISCUSSION**

The Talent Development bench contracts (bench) permit Metro to supplement internal resources by having available consulting firms with a wide range of specialized training and development services.

The bench will provide expertise and resources to support and enhance employee development opportunities. The bench will also support existing leadership development programs and provide a breadth of training opportunities for Metro's 10,000 plus employees.

Metro Talent Development continues to have requests for specialized training offerings and utilizing

this bench will enable staff to honor all requests.

### **FINANCIAL IMPACT**

The funding of \$50,000 for this service is included in the FY18 budget in cost center 6220, Talent Development, under project number 100001, General Overhead.

Since this is a multi-year contract the cost center manager and SBU Chief of Human Capital & Development will be accountable for budgeting the cost in future years, including any option(s) exercised.

### **Impact to Budget**

The source of funds for Project 100001 is General Overhead funds, comprised of federal, state and local funds. These funds are eligible for bus and rail operating costs.

### **ALTERNATIVES CONSIDERED**

Staff has considered using in-house Metro resources to perform this work; however, this approach is not recommended as Metro does not have sufficient resources and subject matter experts available to perform this work.

The Board of Directors may choose not to authorize the contract award for this project; however, this alternative is not recommended as this bench contract is critical to the development and training of Metro's growing workforce.

### **NEXT STEPS**

Upon Board approval, staff will establish and execute the Talent Development bench contracts for specialized training and development services, effective April 1, 2018, and will competitively award individual task orders, on an as-needed basis.

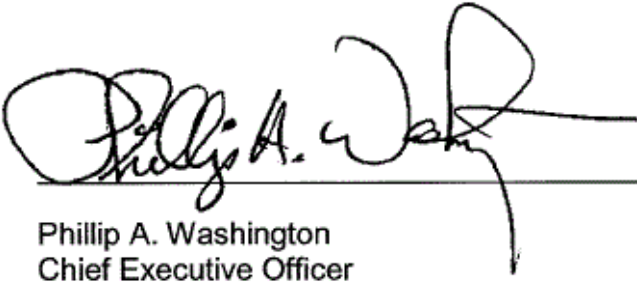
### **ATTACHMENTS**

Attachment A - Procurement Summary

Attachment B - DEOD Summary

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Phillip A. Washington  
Chief Executive Officer

## PROCUREMENT SUMMARY

## METRO TALENT DEVELOPMENT BENCH / PS45898000 – PS45898010

1.	<b>Contract Numbers:</b> PS45898000 through PS45898010	
2.	<b>Recommended Vendors:</b> See Below	
3.	<b>Type of Procurement (check one):</b> <input type="checkbox"/> IFB <input checked="" type="checkbox"/> RFP <input type="checkbox"/> RFP-A&E <input type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order	
4.	<b>Procurement Dates:</b>	
	<b>A. Issued:</b> August 28, 2017	
	<b>B. Advertised/Publicized:</b> August 29, 2017	
	<b>C. Pre-Proposal Conference:</b> September 13, 2017	
	<b>D. Proposals Due:</b> October 6, 2017	
	<b>E. Pre-Qualification Completed:</b> January 23, 2018	
	<b>F. Conflict of Interest Form Submitted to Ethics:</b> December 28, 2017	
	<b>G. Protest Period End Date:</b> March 20, 2018	
5.	<b>Solicitations Picked up/Downloaded:</b> 48	<b>Bids/Proposals Received:</b> 13
6.	<b>Contract Administrator:</b> Marc Margoni	<b>Telephone Number:</b> (213) 922-1304
7.	<b>Project Manager:</b> Stephanie Burke	<b>Telephone Number:</b> (213) 418-3105

**A. Procurement Background**

This Board Action is to approve the award of bench Contract Nos. PS45898000 through PS45898010, in support of Metro's Talent Development Department. The contracts will be for a four-year term, effective April 1, 2018, inclusive of two, one-year options, for a cumulative total amount not-to-exceed \$1,862,106. The purpose of these contracts is to provide professional skills and leadership development in support of Metro's Talent Development Department on an as-needed basis for which task-orders will be competed and issued. Board approval of these contract awards are subject to resolution of any properly submitted protest(s).

Request for Proposal (RFP) No. PS45898 was issued in accordance with Metro's Acquisition Policy, and the contract type is task-order based. The RFP was issued as a small business prime and was open to Metro's SBE certified firms only.

On September 13, 2017, a pre-proposal conference was held with representatives from 24 firms in attendance.

On September 20, 2017, 53 questions were received. Responses to those questions were provided in writing the following week.

No amendments were issued during the solicitation phase of this RFP.

A total of 13 proposals were received on the due date of October 6, 2017 from the firms listed below in alphabetical order:

1. Backstrom Leadership Strategies
2. Cynthia M. Ruiz & Associates
3. Grabowski Collaborative Consulting
4. Insight Strategies, Inc.
5. Kaygen, Inc.
6. Lopez and Company, Inc.
7. MilliMicro Systems, Inc.
8. Newleaf Training and Development
9. OGX Consulting
10. Organic Communications, LLC
11. PROTRANS
12. Skillsoft Corporation
13. The Greg Group, Inc.

**B. Evaluation of Proposals**

The Proposal Evaluation Team (PET) consisting of staff from Metro’s Workforce Services, Talent Development, and Diversity and Economic Opportunity Department was convened and conducted a comprehensive technical evaluation of the proposals received.

Two of the 13 proposers were found ineligible as they are not Metro certified Small Business firms and were removed from consideration, as specified in the RFP. The remaining 11 proposers were identified as Metro Small Business Enterprises (SBE) and/or Disadvantaged Business Enterprises (DBE).

The remaining proposals were evaluated based on the following evaluation criteria and weights:

- Contractor’s Business Profile 10 percent
- Qualifications of Proposed Personnel 20 percent
- Consultant’s Proposed Process and Approach 20 percent
- Technical Discipline Qualification 25 percent
- Technical Discipline Expertise 25 percent

The evaluation criteria are appropriate and consistent with criteria developed for other, similar services. During the week of December 11, 2017, the PET met and conducted an independent technical evaluation. All 11 firms were recommended by the PET to be qualified and included in the bench. These firms are listed below:

No.	CONTRACT NO.	FIRM
1	PS45898000	Grawbowski Collaborative Consulting
2	PS45898001	Insight Strategies, Inc.
3	PS45898002	Kaygen, Inc.
4	PS45898003	Lopez and Company, LLP.
5	PS45898004	MilliMicro Systems, Inc.

6	PS45898005	Newleaf Training and Development
7	PS45898006	OGX Consulting
8	PS45898007	Organic Communications, LLC.
9	PS45898008	PROTRANS
10	PS45898009	Cynthia M. Ruiz & Associates
11	PS45898010	The Greg Group

**Grabowski Collaborative Consulting**

Grabowski Collaborative Consulting (GCC) was founded in 2016, located in Trabuco Canyon, California. GCC’s primary services include team building workshops, executive coaching, conflict resolution, and professional facilitator services. Gregory R. Grabowski, President, has over 30 years of experience in various leadership roles.

**Insight Strategies, Inc.**

Insight Strategies, Inc. (ISI), founded in 1994, is located in Torrance, California. ISI’s primary services include administrative and general management consulting, professional and management development training, public speaking training, customer service and human resource consulting services. Ms. Teri Fisher, CEO and Managing Partner, has performed over 23 years in various capacities: facilitator, executive coaching, training and keynote speaker. This firm has performed satisfactory work for Metro.

**Kaygen, Inc.**

Kaygen, Inc. (KI), founded in 2003, is located in Irvine, California. KI is specialized in Enterprise Information Management, delivering fit-for-purpose solutions, Training and Talent Development services for over a decade with a strong roster of satisfied customers. KI’s team includes senior resources that have extensive experience in executive leadership trainings, technical trainings, and soft skills trainings along with a broad spectrum of technology subject matter experts. This firm has performed satisfactory work for Metro.

**Lopez and Company, LLP**

Lopez and Company, LLP (L&C), founded in 1996, is located in Temecula, California. L&C’s primary services include professional and management development and administrative and general consulting services. L&C is currently on Metro’s Audit Bench and has, for the past 20 years, been providing financial, performance, attestation, staff augmentation and consulting services. This firm has performed satisfactory work for Metro.

**MilliMicro Systems Inc.**

MilliMicro Systems Inc. (MMSI), founded in 1998, is located in Northridge, California. MMSI’s primary services include professional and management development training, IT, and cyber security. Mr. Singh has developed training projects for the

Department of Homeland Security, Metropolitan Water District, U.S Navy, US Marine Corps, US Air Force, US Army, and Fox Channel Group.

### **Newleaf Training and Development**

Newleaf Training and Development (NT&D), founded in 2006, is located in Valencia, California. NT&D's primary services include change management, conflict resolution, leadership communications, team building and stress reduction consultations. Paul Butler, Project Manager, has over 20 years' experience in project management development for corporate, educational, non-profit, and government entities.

### **OGX Consulting**

OGX Consulting (OGX), founded in 2008, is located in Aurora, Colorado. OGX's primary services include administrative and general management consulting, human resource consulting, custom computer and data processing related services. Alvin McBorrough, Managing Partner and Principal Consultant, has over 20 years of experience serving clients in government, technology, media, telecommunications, and financial industries. Mr. McBorrough's expertise spans the areas of operational strategy, technology development, advanced analytics, and operations Management. This firm has performed satisfactory work for Metro.

### **Organic Communications, LLC**

Organic Communications, LLC (OC), founded in 2004, is located in Bel Air, California. OC's primary services include administrative and general management consulting, human resource, public relations, professional and management development training and motivational speaking consulting. Lee Broekman, Principal, has provided communication, management and leadership guidance to professionals and organizations for the past 15 years. Ms. Broekman, a communication lecturer, has taught courses at USC, UCLA School of Law, and has developed the communication and media curriculum at the American Jewish University's College of Arts and Sciences. This firm has performed satisfactory work for Metro.

### **PROTRANS**

PROTRANS, founded in 1972, is located in Newport Beach California. PROTRANS' primary services include instruction in business writing skills, grant writing and basic to advanced English instruction. Elena Rojas, President and CEO of PROTRANS, has held numerous Spanish and English teaching positions throughout her career.

### **Cynthia M. Ruiz & Associates**

Cynthia M. Ruiz & Associates (CMR&A), founded in 2015, is located in Los Angeles, California. CMR&A's primary services include marketing and general management consulting services. Cynthia M. Ruiz, Principal, has over 30 years' experience in teaching and currently is a Professor at the University of West Los Angeles where she teaches graduate level courses in leadership and management at the School of Business. Ms. Ruiz has received over 50 awards and accolades for her leadership

and service to the City of Los Angeles. This firm has performed satisfactory work for Metro.

**The Greg Group, Inc.**

The Greg Group Inc. (TGGI), founded in 2015, is located in Redondo Beach, California. TGGI's primary services include computer training and education programs. Gregory J. Sirbu, President/Principal, has over 30 years' experience working closely with direct report technology teams to implement a wide range of IT related business goals.

**C. Cost/Price Analysis**

The RFP contained neither price nor a specific Statement of Work. Each future task order will contain a specific Statement of Work which will be competed with the bench firms. These firms will propose according to the requirements of the task order and a cost/price analysis will be performed, as appropriate, on all task orders issued.

**D. Background on Recommended Contractors**

All 11 firms listed above are recommended for award. These firms have been evaluated and are determined to be responsive and responsible to perform work on Metro assignments on an as-needed task order basis.



## DEOD SUMMARY

## METRO TALENT DEVELOPMENT BENCH / PS45898000 – PS45898010

**A. Small Business Participation**

Pursuant to Metro's Board-approved policy, competitive acquisitions with three or more Small Business Enterprise (SBE) certified firms within the specified North American Industry Classification System (NAICS) as identified for the project scope shall constitute a Small Business Set-Aside procurement. Accordingly, the Contract Administrator advanced the solicitation, including posting the solicitation on Metro's website, advertising, and notifying certified small businesses as identified by NAICS code(s) that this solicitation was open to **SBE Certified Small Businesses Only**.

All bench participants are SBE primes and have committed to perform 30% or more of the work with their own workforces. Work throughout these Contracts will be issued on a task order basis as needed.

**SMALL BUSINESS PRIME (SET-ASIDE)**

	<b>SBE Primes</b>	<b>SBE % Committed</b>
1.	Grawbowski Collaborative Consulting	100%
2.	Insight Strategies, Inc.	100%
3.	Kaygen, Inc.	100%
4.	Lopez and Company, LLP	100%
5.	Milli Micro Systems, Inc.	60%
6.	Newleaf Training and Development	100%
7.	OGx Consulting	100%
8.	Organic Communications, LLC	100%
9.	PROTRANS	100%
10.	Cynthia M. Ruiz & Associates	100%
11.	The Greg Group	30%
	<b>Total Commitment</b>	

**B. Living Wage and Service Contract Worker Retention Policy Applicability**

The Living Wage and Service Contract Worker Retention Policy is not applicable to these Contracts.

**C. Prevailing Wage Applicability**

Prevailing wage is not applicable to these Contracts.

**D. Project Labor Agreement/Construction Careers Policy**

Project Labor Agreement/Construction Careers Policy is not applicable to these Contracts.