



ITEM ID: 2024-328-0

TRANSMITTAL DATE: November 1, 2024

MEETING DATE: November 8, 2024

TO: Board of Directors

FROM: Justin Fornelli, Chief, Program Delivery

SUBJECT: Contract No. LI292-24 - Project Management Information System - Recommendation to Award - D.R. McNatty & Associates

Issue

The Authority requires a cloud-based Project Management Information System (PMIS) implementation and managed services to help manage and document the complete project lifecycle of numerous projects being simultaneously executed within Planning, Program Delivery and Operations Departments.

Recommendation

It is recommended that the Board authorize the Chief Executive Officer to award Contract No. LI292-24 to D.R. McNatty & Associates, Inc. for a total not-to-exceed contract authority of \$3,642,310 for a period of performance of five years. The award is subject to resolution of any timely filed protests.

Strategic Commitment

This report aligns with the following Strategic Business Plan Commitment:

- **Modernizing Business Practices:** The implementation of Program Management Information System (PMIS) is expected to improve our operational efficiency through reduction of manual processes, transparency, objective metrics and streamlined governance investing in the development of our employees. The proposed contract will provide a cloud-based modern Project Management Information System (PMIS), configuration and implementation services, and extended managed services to help troubleshoot and provide additional training (if needed) for numerous projects being

simultaneously executed within Planning, Program Delivery and Operations Departments.

Background

As the Authority is delivering more complex projects, a reliable Project Management Information System (PMIS) is required to efficiently and effectively execute numerous projects for the Planning, Program Delivery and Operations Department. An effective PMIS system is needed to provide:

- Integrated solutions to minimize manual data entry and maximize efficiency and reliability;
- Greater program/project delivery certainty regarding budget and schedule;
- Single source of truth for projects attributes; and
- Full audit trail of project information. Central auditable repository of all cost, contracts and grant information.

An effective PMIS ensures project communication and improves execution and outcome, no matter the project size. During the planning process, project managers will use PMIS to establish the project baseline in terms of scope, schedule and budget. At the execution of the project the PMIS is used to compare the baseline with the actual accomplishment of each activity, collect financial data, and keep a record for reporting purposes.

The Key benefits to be realized by Metrolink once PMIS is implemented include:

- Elimination of spreadsheets, homegrown tools, formula errors, and manual processes for budgeting, forecasting and reporting;
- Time savings of manual data collection tasks, allowing for time for performance and trend analysis;
- Real time visibility into project data with transactional drill-downs;
- Central auditable repository of all project information; and
- Automated dashboard and report.

The proposed project shall provide software and services including but not limited to configuration, integration, data migration, testing, training, and hyper care/warranty and application-managed services. The tool will provide project managers and program leads, in addition to the Authority's management, with a means by which overall program scope, cost, and schedule elements and other relevant data elements can be effectively organized, monitored, documented, and executed. This includes capital improvement and rehabilitation projects initiated by the Authority and projects undertaken by third parties that directly impact the safety and service of the Authority's operations and facilities. The PMIS will enable the Authority to implement consistent, standardized processes and practices across all design and construction projects, from conception to close-out. The PMIS will provide integrated solutions to minimize data entry and maximize efficiency and reliability, allow for greater program/project delivery certainty regarding budget and schedule, provide a single source of truth, and streamline reports and data validation.

Discussion

On January 8, 2024, the Authority issued Request for Proposals (RFP) No. LI292-24, seeking

proposals from qualified firms for a cloud-based Project Management Information System (PMIS) implementation and managed services. The RFP was posted on the Authority's online solicitation portal and notifications were sent to 1,228 registered firms. The Authority also advertised the RFP in publications in the five member counties and in diversity newspapers.

One hundred thirty-seven prospective bidders viewed the RFP, and twenty-three prospective proposers attended the virtual pre-proposal Conference held on January 24, 2024. The Authority received and answered one hundred seventy-three questions.

The RFP included the following Evaluation Criteria:

Mandatory Solution Requirements: Pass/Fail

A - Firm Qualifications: 10 points

B - Detailed Business Requirements: 30 points

C - Qualifications of Assigned Project Team: 15 points

D - Project Management Approach & Methodology: 15 points

E - Demonstration: 10 points

F - Price: 20 points.

A minimum technical score of 49 points was established, based on the technical evaluation criteria (A-D). Only proposers meeting the minimum technical score would be further considered for evaluation. The Authority received eleven proposals by the submission due date of May 17, 2024. Four proposals failed to meet the Mandatory Solution Requirements, and one proposal was deemed unresponsive as it did not properly complete the Price Proposal. The remaining six responsive proposals advanced to the technical evaluation phase.

Based on the initial scoring of the technical evaluation criteria, three of the six responsive proposers met the minimum technical score and were invited to present their proposed solution to the Evaluation Committee. After scoring of technical proposals and demonstrations by the Evaluation Committee, and after adding the price score which was calculated per the RFP based on the submitted price proposals, the final scores were as follows:

		Aurigo	Deloitte	D.R. McNatty
Evaluation Criteria	Max Points	Score	Score	Score
Technical Score	70	59.01	56.38	53.91
Demonstration Score	10	6.20	6.95	8.35
Price Score	20	8.14	5.10	20.00
Total Score	100	73.35	68.43	82.26
Final Ranking		2	3	1

D.R. McNatty (DRM) was found to be the highest ranked proposer. The Authority held negotiations with DRM, which resulted in revised price proposal. Staff deemed the revised price proposal to be fair and reasonable, and aligned with current market prices and the Authority's Independent Cost Estimates (ICE).

A Disadvantaged Business Enterprise (DBE) contract specific goal of 0% has been established for this U.S. Department of Transportation assisted contract due to lack of subcontracting opportunities for specific software projects, based on recommendation from the Authority's DBE consultant. The recommended firm was found responsive to the DBE

requirements.

Budget Impact

The amounts for which contract authority is requested are included in the Adopted FY2022-23 Capital Budget (\$3,642,310). No additional funding is required currently for this project.

Next Steps

Upon Board approval of the award, staff will execute contracts with D.R. McNatty & Associates, Inc., and issue Notice to Proceed.

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Attachment(s)

[Presentation - Project Management Information System](#)