




October 5, 2020

To: Executive Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Agreement for Security System Service and Maintenance

Overview

On June 2, 2020, the Orange County Transportation Authority released a request for proposals for professional and technical services to provide security system service and maintenance. Proposals were received in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for security system service and maintenance.

Recommendations

- A. Approve the selection of Climatec LLC as the firm to provide service and maintenance of the Orange County Transportation Authority's security system.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2341 between the Orange County Transportation Authority and Climatec LLC, in the amount of \$537,600, for a five-year term, to provide service and maintenance of the Orange County Transportation Authority's security system.

Discussion

The Orange County Transportation Authority (OCTA) uses contracted professional and technical services to provide maintenance and repair services, including preventative maintenance to OCTA's security systems. This contracted service is vital to ensure all equipment is maintained and operating with full functionality and reliability. Additionally, this contracted service ensures operability issues are resolved in a timely manner without compromising the levels of security.

While some calls for service or maintenance can be anticipated and planned for, the majority of service calls are unexpected. Examples of unplanned maintenance and repairs include repairing door lock solenoids, addressing pin/latch misalignments, replacing card readers as it relates to access control equipment, and maintenance to the video management system. Additionally, addressing power issues, replacing batteries and supply boards, addressing server updates, and installing cameras related to the video management system are all unplanned service calls.

The current service contract for security system service and maintenance is set to expire October 31, 2020. The continuation of these services is vital to ensure optimal operability of OCTA's security systems.

Procurement Approach

The procurement was handled in accordance with OCTA Board of Directors' (Board)-approved procedures for professional and technical services. Various factors are considered in the award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On June 2, 2020, Request for Proposals (RFP) 0-2341 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on June 2 and 8, 2020. A pre-proposal conference was held on June 8, 2020, with four attendees representing four firms. Six addenda were issued to handle administrative issues related to the RFP, make available the pre-proposal conference registration sheet and presentation, as well as respond to written questions.

On June 30, 2020, three proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Security and Emergency Preparedness, Facilities Engineering, Information Systems, and General Services departments, as well as an external evaluator from the County of Orange, met to review all the proposals received.

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

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|-------------------------------------|------------|
| • Qualifications of the Firm | 30 percent |
| • Staffing and Project Organization | 25 percent |
| • Work Plan | 25 percent |
| • Cost and Price | 20 percent |

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm was weighted at 30 percent as the firm had to meet or exceed specific minimum requirements, such as eight years of experience in security system concepts and installation for clients similar in size to OCTA, as well as being an authorized reseller for Lenel and Milestone security systems, which are currently utilized by OCTA. Staffing and project organization was weighted at 25 percent as the proposed project team needed to include Lenel and Milestone certified technicians, as well as meet the minimum years of experience. Work plan was also weighted at 25 percent as the firm had to discuss its approach to meeting the service and maintenance requirements. Cost was weighted at 20 percent to ensure that OCTA receives value for the services provided.

On July 15, 2020, the evaluation committee reviewed the proposals based on the evaluation criteria and short-listed the two most qualified firms listed below in alphabetical order:

Firm and Location

Climatec LLC (Climatec)
Anaheim, California

Convergint Technologies (Convergint)
Orange, California

On July 22, 2020, the evaluation committee conducted interviews with the short-listed firms. The interview consisted of a presentation by each firm to demonstrate the firms' understanding of OCTA's requirements. The firms' project managers and key team members had an opportunity to present each team's qualifications and respond to the evaluation committee's questions. Questions were related to assessment and inspection of the security systems, quality control measures, and processes for managing multiple projects and service calls, as well as specific clarification questions related to each firm's proposal.

After considering responses to questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and made adjustments to individuals scores. As a result, the rankings changed.

Based on the evaluation of the written technical proposals and the information obtained from the interviews, the evaluation committee recommends Climatec for consideration of the award. The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

Climatec and Convergent both demonstrated extensive experience with security system concepts and installations for clients similar in size to OCTA. Both firms also provided proof of business, occupational, and trade licenses required by law to perform the security system services. Additionally, both firms are authorized resellers for Lenel and Milestone security systems.

Climatec has been providing security system services since 1975. The firm has over 500 employees across multiple locations in California. The firm proposed its office in the City of Anaheim for this effort with its office in the City of Van Nuys as a backup. Climatec detailed its experience providing similar access control and video system installation and maintenance services to its clients, which include the County of Orange, NBC Universal Studios, Broadcom, and Lucas Museum. The projects include installation and maintenance of Lenel and Milestone security systems. During the interview, Climatec clarified that it has the appropriate certifications to meet OCTA's requirements. The firm also elaborated on its experience with Lenel and Milestone and demonstrated its expertise in the industry.

Convergent was established in 2001 with 110 offices in North America and over 5,000 employees. The office proposed for this effort is located in the City of Orange with a backup office in the City of San Diego. Convergent is currently providing security system services to OCTA. The firm also worked with OCTA in the installation of a video surveillance system at the Laguna Niguel/Mission Viejo Metrolink station. Convergent's other clients include the Port of Los Angeles, Metrolink, and Los Angeles World Airports. The firm has received recognition and awards from Lenel and Milestone.

Staffing and Project Organization

Both firms proposed project teams with relevant experience and provided copies of current certifications and licenses.

Climatec's proposed project team is broken down into three sub teams to ensure that OCTA's needs are met as it relates to service calls, installation projects, and system solutions. A project manager is proposed to lead each sub-team. The proposed project manager for day-to-day service and repairs will be the overall project manager and main point of contact for this effort. Climatec proposed multiple experienced certified field technicians to perform service, maintenance, and repair work. During the interview, the project team discussed their roles and approach to meeting the security system service and maintenance requirements. The firm's responses to the evaluation committee's questions

demonstrated the project team's knowledge of various security system solutions. The firm also detailed that it has the resources available to meet OCTA's needs and how the technicians will be assigned to respond to different types of service calls. Furthermore, Climatec can utilize and assign the technicians from the other sub-teams for additional support if needed.

Convergint's proposed project team includes individuals currently providing security system services to OCTA. The project team includes an account executive for business communications, a project manager for installation projects, and a service manager for day-to-day activities. Convergint proposed a deep bench of certified technicians with relevant experience to provide maintenance and repair services. During the interview, the project team members discussed their roles and approach to meeting OCTA's requirements. The firm also responded to evaluation committee's questions, which included clarifications about its project team structure and the individual proposed as the overall project manager and main point of contact.

Work Plan

Climatec provided an overview of its approach to meeting the requirements of the scope of work. The firm discussed its 24-hour customer care center and emergency response system for managing requests and service calls. The firm described its service delivery framework and how it correlates with OCTA's established business impact levels by providing potential scenarios and how the firm would respond to the service calls. Climatec discussed its process for installation projects and the activities involved, which range from creating the project scope to installing and testing the new system or equipment. The firm also discussed the importance of proper planning and coordination to ensure that any modifications or installations are completed with minimal issues. While the firm provided a general overview in its written proposal, Climatec provided more detail about its approach and understanding of the scope of work during the interview. The firm also elaborated on its quality control process and how various service calls and projects are prioritized and managed.

Convergint presented a detailed work plan that demonstrated its understanding of the scope of work. The firm discussed its approach for the first 90 days of the new contract, such as confirming roles and responsibilities, establishing performance expectations and metrics, and how various projects will be managed. Convergint included sample checklists and schedules for preventative maintenance of the security system server, access control system, and cameras. The firm discussed its project controls and implementation plan for installation projects, which include managing the schedule, budget, and project quality controls, leading coordination meetings, and adhering to the overall master plan

and schedule. Convergent emphasized the importance of proactive communication and that it has escalation procedures in place. The firm described its process for service calls and how it would respond to OCTA's established business impact levels. The firm also discussed its web-based service portal to facilitate service requests and track progress of requests in real time.

Cost and Price

Pricing scores were based on a formula, which assigned the highest score to the firm with the lowest weighted average hourly rate per service call and scored the other proposals' weighted average hourly rate per service call on their relation to the lowest weighted average hourly rate per service call. Climatec proposed the lowest weighted average hourly rate per service call.

Procurement Summary

Based on the evaluation of written proposals, the firms' qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of Climatec as the top-ranked firm to provide service and maintenance of OCTA's security system. Climatec delivered a thorough and comprehensive proposal and an interview that was responsive to all the requirements of the RFP.

Fiscal Impact

The project was approved in OCTA's Fiscal Year 2020-21 Budget, Chief Executive Office, accounts 1316-7611-A5310-OJO, 1316-7611-A5310-OJ1, 1316-7611-A5310-OJ2, 1316-7611-A5310-OJ3, 1316-7611-A5310-ORR, and 1316-7611-A5310-OZK, and is funded through local funds.

Summary

Staff is recommending the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2341 with Climatec LLC, in the amount of \$537,600, for a five-year term, to provide security system service and maintenance.

Attachments

- A. Review of Proposals, RFP 0-2341 Security System Service and Maintenance
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 0-2341 Security System Service and Maintenance
- C. Contract History for the Past Two Years, RFP 0-2341 Security System Service and Maintenance

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