



**August 5, 2019**

**To:** Regional Planning and Highways Committee

**From:** Darrell E. Johnson, Chief Executive Officer

A handwritten signature in blue ink, appearing to read "Darrell Johnson", is placed over the "From:" line of the memo.

**Subject:** Consultant Selection for South Orange County Multimodal Transportation Study

**Overview**

Pursuant to the 2019 Orange County Transportation Authority Board of Directors Strategic Initiatives, consultant services are needed to conduct a multimodal transportation study to identify solutions for south Orange County's current and future mobility needs. 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 select a firm to conduct the South Orange County Multimodal Transportation Study.

**Recommendations**

- A. Approve the selection of HDR Engineering, Inc., as the firm to conduct the South Orange County Multimodal Transportation Study.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1121 between the Orange County Transportation Authority and HDR Engineering, Inc., in the amount of \$749,969, to conduct the South Orange County Multimodal Transportation Study for a two-year term.

**Discussion**

The 2019 Orange County Transportation Authority (OCTA) Board of Directors (Board) Strategic Initiatives call for the initiation of a transportation study to identify recommendations for south Orange County's current and future mobility issues. The South Orange County Multimodal Transportation Study will identify a broad range of recommendations for the area, including multimodal transportation improvements and transportation demand management strategies.

Consideration will be given to strategies that reduce congestion by providing more transportation choices for residents, commuters, and visitors, while preserving the local sense of community.

The South Orange County Multimodal Transportation Study is intended, in part, to update the South Orange County Major Investment Study completed in 2008. While many of the recommendations from the 2008 study continue to be relevant today, much has also changed over the last decade. Such changes include the completion of several projects comprising the Locally Preferred Strategy from the 2008 study, slower socioeconomic growth projections, a decline in transit ridership, the introduction of transportation network companies, an expanding fleet of electric vehicles, widespread use of navigation/traffic apps, and emerging connected and autonomous vehicle technologies.

The transportation planning context has changed significantly, including how transportation impacts are evaluated under the California Environmental Quality Act. This will likely continue to change as new legislation and guidance continue to develop that focus on reducing growth in vehicle miles traveled as an integral strategy for reducing greenhouse gas emissions.

The objective of the South Orange County Multimodal Transportation Study is to define the mobility needs, identify a range of multimodal transportation improvement options, and carry forward a set of preferred improvements and strategies into subsequent project development and selection processes. Stakeholders will be engaged to help evaluate study area transportation system performance, define transportation deficiencies, develop a purpose and need statement, establish goals, objectives and performance measures, and evaluate a set of viable conceptual alternatives for future project development processes.

### ***Procurement Approach***

This procurement was handled in accordance with OCTA's Board-approved procedures for professional and technical services. In addition to cost, many other factors are considered in an award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as staffing and project organization, prior experience with similar projects, work plan, as well as fair and reasonable costs.

On April 2, 2019, Request for Proposals (RFP) 9-1121 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on April 2 and 9, 2019. A pre-proposal conference was held on April 9, 2019,

with attendees representing 13 firms. Three addenda were issued to make available a copy of the pre-proposal conference registration sheet, pre-proposal presentations, respond to questions related to the RFP, and for administrative changes.

On April 30, 2019, two proposals were received, which collectively reflect the combined input from 12 individual firms as illustrated in Attachment A. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Planning and Analysis, and Government Relations departments, as well as external representatives from the California Department of Transportation and the Southern California Association of Governments (SCAG) met to review both proposals.

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

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

Several factors were considered in developing the evaluation criteria weightings. The work plan was assigned a 20 percent weighting to ensure the firm demonstrated its understanding of the identified tasks, deliverables, and schedules. Qualifications of the firm, as well as cost, were each assigned a 25 percent weighting. Similar knowledge and experience conducting corridor studies, long-range transportation plans, transit, and rail studies illustrate qualifications of the firm.

Staffing and project organization was weighted the highest at 30 percent to emphasize the importance of the proposed project team's qualifications and experience performing similar studies. Also, the project managers experience will be critical in leading the development and delivery of the multimodal transportation study identified in the scope of work.

On May 21, 2019, the evaluation committee reviewed the two proposals received based on the evaluation criteria and conducted interviews with both firms listed below in alphabetical order:

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Firm and Location

HDR Engineering, Inc. (HDR)  
Irvine, California

Iteris, Inc. (Iteris)  
Santa Ana, California

The interviews took place on May 28, 2019, and consisted of a presentation 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 asked relative to the proposed key personnel's experience on similar projects, experience collecting and analyzing traffic patterns, and current and potential future multimodal challenges and opportunities. Finally, each team was asked specific clarification questions related to their proposal.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary ranking for both firms and made adjustments to individual scores. However, HDR remained the highest ranked firm with the highest cumulative score.

Based on the evaluation of the written proposals, the firms' qualifications, proposed costs, and the information obtained from the interviews, the evaluation committee recommends HDR for consideration of the award. The following is a summary of the proposal evaluation results.

**Qualifications of the Firm**

Both firms demonstrated experience conducting multimodal studies throughout Southern California.

HDR was founded in 1917, with a local office in the City of Irvine. The firm has experience conducting various multimodal studies for the City of Long Beach, Los Angeles County Metropolitan Transportation Authority (LACMTA), Riverside County Transportation Commission (RCTC), San Bernardino County Transportation Authority, and OCTA. HDR conducted the Pacific Coast Highway (PCH) Corridor Study for OCTA, which included a broad range of transportation opportunities and improvements along PCH. Lastly, HDR and its subcontractors demonstrated experience with different aspects of transportation planning projects, including the Orange County foothills and districts 1 and 2 bikeways strategy reports, regional modeling and traffic operation, and the Orange County Transit Vision – Transit Master Plan.

Iteris was founded in 1987, with a local office in the City of Santa Ana. The firm has experience conducting multimodal studies for local agencies and cities including the Long-Range Transportation Plan for RCTC and the US-101 Multimodal Mobility Plan for the County of Ventura. Iteris proposed using a subcontractor with relevant experience in transportation studies, including the Interstate 5 Corridor Sustainability Study for SCAG, the Beach Boulevard Corridor Specific Plan and Environmental Impact Report for the City of Anaheim, and the Master Plan of Arterial Highways Complete Streets Assessment for OCTA.

#### Staffing and Project Organization

Both firms proposed project teams with experience and knowledge of multimodal transportation studies. Key project staff proposed by the firms include individuals that have worked with OCTA on previous transportation study related projects.

The project manager for HDR has 39 years of experience in planning transportation systems throughout Southern California and has been with the firm nine years. Specifically, the project manager has led multimodal studies projects within the project area, including the PCH Corridor Highway Study and the Orange County Freeway Study for OCTA. HDR's proposed key personnel have worked in the transportation industry for an average of 20 years and have relevant experience on similar projects in the counties of Los Angeles, Orange, Riverside, and San Bernardino. Other key personnel experience includes multiple bus, pedestrian, freeway, transit corridor studies, road improvement and rail projects, such as the Laguna Canyon Road State Route 133 Project Study Report, Interstate 405 Corridor Major Investment Study, and the Orange County Freeway Study.

The project manager for Iteris has 30 years of experience in planning transportation systems throughout Southern California and ten years with the firm. He has led multimodal studies including the RCTC Long-Range Transportation Plan and the LACMTA State Route 138 Project Approval and Environmental Document. Other key personnel have worked in the transportation industry for an average of 22 years and have relevant experience on similar projects. The key personnel's experience includes the US-101 Multimodal Mobility Plan for the County of Ventura and work as a subconsultant on the Orange County Freeway Study for OCTA. The proposed project organization was unclear as the firm proposed to utilize subcontractors to perform key job functions by individuals not identified as key personnel.

### Work Plan

Both firms proposed similar timelines to meet the project schedule.

HDR presented a work plan that demonstrated its approach to completing the tasks and deliverables identified in the scope of work. The firm's approach to the work plan considered the recommendations and findings of the 2008 South Orange County Major Investment Study, as well as new modes of transportation, such as on-demand rideshare services and mobile travel apps. The firm also included a detailed flow chart of the project development and technical process with all major and minor phases in each task identified. HDR proposed enhancements using big data and Orange County Transportation Analysis Model to understand south Orange County travel patterns. This approach will allow HDR to collect and review data beyond the scope of the project.

Iteris' work plan acknowledged all of the tasks in the scope of work; however, its approach to completing all of the deliverables, specifically the potential alternatives for the study, was not described in its proposal or clarified in the interview.

### Cost and Price

Pricing scores were based on a formula that assigned the higher score to the firm with the lower total firm-fixed price for the tasks to be completed, and scored the other proposal's total firm-fixed price based on its relation to the lower total firm-fixed price. HDR's proposed firm-fixed price is competitive with the lower proposed firm-fixed price.

### Procurement Summary

Based on the evaluation of the written proposals, the firms' qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of HDR as the top-ranked firm to conduct the South Orange County Multimodal Transportation Study. HDR demonstrated strong relevant experience, competitive pricing, and submitted a thorough and comprehensive proposal that was responsive to all requirements of the RFP.

### Fiscal Impact

The project is included in OCTA's Fiscal Year 2019-20 Budget, Planning and Analysis Division, Account 1531-7519-A4461-0QK, and is funded by Federal Regional Surface Transportation Program funds.

**Summary**

Based on the information provided, staff recommends the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1121 between OCTA and HDR, in the amount of \$749,969, to conduct the South Orange County Multimodal Transportation Study for a two-year term.

**Attachments**

- A. Review of Proposals, RFP 9-1121 South Orange County Multimodal Study
- B. Proposal Evaluation Criteria Matrix, RFP 9-1121 South Orange County Multimodal Study
- C. Contract History for the Past Two Years, RFP 9-1121 South Orange County Multimodal Study

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