




**November 6, 2023**

**To:** Regional Transportation Planning Committee  
**From:** Darrell E. Johnson, Chief Executive Officer   
**Subject:** Agreement for Biological Preserve Monitoring Services

### **Overview**

Consultant services are needed to provide biological monitoring of the conservation lands acquired through the Orange County Transportation Authority's Measure M2 Environmental Mitigation Program. Proposals were received in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Approval is requested to execute an agreement to provide these services.

### **Recommendations**

- A. Approve the selection of Glenn Lukos Associates, Inc., to provide biological preserve monitoring services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-3-2700 between the Orange County Transportation Authority and Glenn Lukos Associates, Inc., in the amount of \$500,000, to provide biological preserve monitoring services for a four-year term.

### **Discussion**

Measure M2 (M2) includes the Environmental Mitigation Program (EMP), intended to mitigate the biological resource impacts of the 13 M2 freeway projects and streamline approval processes with state and federal resource agencies. This was achieved by developing a Natural Community Conservation Plan/Habitat Conservation Plan (Conservation Plan), approved by the California Department of Fish and Wildlife and the United States Fish and Wildlife Service (Wildlife Agencies). As shown in Attachment A, the Orange County Transportation Authority (OCTA) has acquired seven conservation properties (Preserves) consistent with the Conservation Plan.

The Wildlife Agencies approved the Conservation Plan and issued permits to OCTA in 2017. As required by the Conservation Plan, each Preserve has a completed Resource Management Plan (RMP) that defines the necessary management activities. OCTA maintains separate contracts to cover the security, maintenance, and biological monitoring needs of the Preserves. The OCTA project manager serves as the Preserve Manager and coordinates the activities of the different contractors.

OCTA requires the services of a consultant to serve as a resource to facilitate the successful completion of various tasks for all seven of the Preserves. This includes general biological monitoring, focused species surveys (plants and animals), United States Army Corps of Engineers required monitoring tasks, invasive species control, comprehensive vegetation mapping, and assistance with public outreach events and routine reporting. Approving the agreement for biological monitoring services on the Preserves will enable OCTA to meet its commitments pursuant to the Conservation Plan.

### ***Procurement Approach***

This procurement was handled in accordance with OCTA Board of Directors (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. The award is recommended to the firm offering the most comprehensive overall proposal, considering such factors as project organization and staffing, prior experience with similar projects, work plan, as well as cost and price.

On July 12, 2023, Request for Proposals (RFP) 3-2700 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on July 12 and July 17, 2023. A pre-proposal conference was held on July 18, 2023, with 12 attendees representing nine firms. Three addenda were issued to provide a copy of the pre-proposal registration sheet and presentation, as well as respond to questions related to the RFP.

On August 8, 2023, four proposals were received. One firm retracted its proposal as its intent was to introduce its firm as a vendor to OCTA and not as a proposer to the RFP. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Project Development, and Transportation Modeling departments, as well as an external representative from Orange County Public Works, met to review all proposals received. The proposals were evaluated based on the following evaluation criteria and weightings:

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

Several factors were considered in developing the criteria weightings. The qualifications of the firm were weighted at 25 percent as the firms must demonstrate relevant experience monitoring similar biological resources. Staffing and project organization was weighted at 30 percent to ensure the proposed project team met the required skills and expertise needed to perform the work. The work plan was weighted at 20 percent as the firms had to demonstrate their understanding of the habitats and species in the Preserves and discuss their approach to monitoring the Preserves. Cost and price was weighted at 25 percent to ensure hourly rates remain competitive.

On August 15, 2023, the evaluation committee reviewed three proposals based on the evaluation criteria and short-listed the two most qualified firms. The two short-listed firms are listed below in alphabetical order:

Firm and Location

Chambers Group, Inc. (Chambers Group)  
Costa Mesa, California

Glenn Lukos Associates, Inc. (GLA)  
Santa Ana, California

On August 23, 2023, the evaluation committee interviewed the short-listed firms. The interviews consisted of a presentation by each firm to demonstrate their 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 firms' knowledge of stressors affecting conserved lands, proposed subcontractor experience, staff training, and certifications, as well as specific clarification questions related to each firm's proposal. At the conclusion of the interviews, a request for a best and final offer (BAFO) was sent to both firms to seek additional clarifications related to proposed key personnel and final pricing.

After considering responses to questions asked during the interviews, as well as information provided in the BAFO, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores. However, GLA remained the higher-ranked firm with the higher overall score.

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

#### Qualifications of the Firm

GLA is located in the City of Santa Ana and has been providing environmental services since 1989. The firm employs 19 full-time environmental professionals, four part-time staff, and four administrative staff. The firm has extensive experience with preserve management, specifically within Orange County (OC). The firm has worked with several local public and private entities including biological and regulatory services for the City of Laguna Beach and rapid assessment monitoring for the Rancho Mission Viejo Land Trust. The firm also provided monitoring services for the Ranch at Laguna Beach Project with the City of Laguna Beach, which involved coordination with the United States Fish and Wildlife Services and the California Coastal Commission, demonstrating the firm's ability to coordinate with multiple agencies during a project. GLA currently provides biological preserve monitoring support at the OCTA Preserves and serves as a guide during OCTA public outreach events. Additionally, GLA's proposed subcontractor has worked on the same project for OCTA for the past eight years and has experience working with GLA for 26 years. GLA has also provided various biological monitoring and regulatory services for the Irvine Company and the Rancho Mission Viejo Company. Lastly, the work performed was consistent with the County of Orange Central and Coastal Natural Community Conservation Plan/Habitat Conservation Plan requirements. GLA received positive feedback from its references.

Founded in 1979, Chambers Group is headquartered in the City of Costa Mesa with an additional office in the City of San Diego. The firm has a total of 40 full-time employees. Chambers Group detailed its ability to comply with multiple regulatory agency requirements, such as adherence to the California Environmental Quality Act. Although the firm has experience providing monitoring of several species, the proposal did not demonstrate experience working with some species identified in the scope of work (SOW), such as large mammals. Additionally, the firm's proposal lacked details on experience with open space preserve monitoring services. Chambers Group proposed a subcontractor who is a master-certified arborist with extensive experience; however, the firm did not address experience working with the proposed subcontractor and provided limited information in response to questions regarding its past experience with the proposed subcontractor. Chambers Group received positive feedback from its references.

### Staffing and Project Organization

GLA proposed a project team with extensive experience that includes individuals currently providing biological preserve monitoring services for the OCTA Preserves. The proposed project manager has 18 years of experience in managing teams of biologists, restoration ecologists, monitors, and Geographic Information System (GIS) specialists for projects throughout Southern California. The proposed lead biologist has over 26 years of experience, and the proposed restoration ecologist developed all the invasive species management plans for the OCTA Preserves. The proposed GIS Specialist met the minimum years of experience required in the SOW. The proposed team demonstrated knowledge in key areas such as sensitive wildlife, plant species, and vegetation communities in the foothills and coastline. The proposed team also has relevant experience with restoration projects, sensitive species surveys, vegetation mapping, plant surveys, and other environmental services throughout OC. Furthermore, the proposed team has experience with all covered species and habitats identified in the SOW. During the interview, the project team provided thorough responses to the evaluation committee's questions.

Chambers Group proposed a project team with restoration and monitoring project experience. The proposed project manager has over 15 years of experience in project management and as a restoration ecologist. The proposed lead biologist and certified arborist have 13 and 20 years of experience, respectively. In their proposal, the GIS Specialist lacked the minimum years of experience required in the SOW. The firm's staff demonstrated experience with biological monitoring in OC and the ability to be cross-trained and fill dual roles during project implementation. Additionally, staff experience with the specific covered species mentioned in the SOW was not clear. Clarifying questions related to these areas were asked during the interview; however, Chambers Group did not provide clear responses about their experience related to the OCTA-covered species and GIS relevant experience.

### Work Plan

GLA presented a comprehensive work plan that addressed all elements of the SOW. The firm presented a clear approach to accomplish the necessary tasks and flexibility in scheduling based on needs. GLA demonstrated an understanding and background of the OCTA's Conservation Plan, RMPs, and goals of the M2 EMP. The firm demonstrated knowledge of current OCTA Preserve conditions and potential issues and threats, as well as documentation of covered species such as location data. Additionally, the firm provided detail on their ability to use photo monitoring and mapping for wildlife and vegetation communities, as well as invasive species on the OCTA Preserves which helps

to determine wildlife movement and monitoring over the health of different natural communities within the OCTA Preserves. Furthermore, the firm's approach emphasized the need to shift and be flexible depending on OCTA Preserve needs. During the interview, the project team's presentation expanded on their understanding of the project requirements.

Chambers Group demonstrated a good understanding of the SOW requirements. The firm discussed its approach to completing the requirements of the SOW and outlined the activities involved in doing so. The firm provided details on its quality assurance and quality control measures, as well as addressed timelines and schedules related to monitoring the OCTA Preserves. The firm had several deficiencies regarding its work plan, such as frequency of site visits needed at select OCTA Preserves and their approach geared toward monitoring mitigation sites as opposed to open space managed lands. In addition, there was no mention of potential issues facing OCTA Preserves. During the interview, Chambers Group provided general responses to questions and additional detail was not provided outside of what was already discussed in the proposal.

#### Cost and Price

Pricing scores were based on a formula that assigned the higher score to the firm with the lower weighted average hourly rate and scored the other proposal's weighted average hourly rate based on its relation to the lower weighted average hourly rate. Although GLA's weighted average hourly rate was not the lower of the short-listed firms, the rates are deemed fair and reasonable as they are competitive with contracts for similar services. Therefore, GLA's proposed hourly rates are deemed fair and reasonable.

#### Procurement Summary

Based on the evaluation of written proposals, the firms' qualifications and the information obtained from the interviews and BAFO, the evaluation committee recommends the selection of GLA as the top-ranked firm to provide biological preserve monitoring services. GLA delivered a thorough and comprehensive proposal and an interview that was responsive to all the requirements of the RFP.

#### Fiscal Impact

This project was approved in OCTA's Fiscal Year 2023-24 Budget, Planning Division, Account No. 0017-7519-FX001-OYP, and is funded with local funds from M2 sales tax revenues.

**Summary**

Staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-3-2700 between the Orange County Transportation Authority and Glenn Lukos Associates, Inc., in the amount of \$500,000, to provide biological preserve monitoring services for a four-year term.

**Attachments**

- A. OCTA Preserves
- B. Review of Proposals, RFP 3-2700 Biological Preserve Monitoring Services
- C. Proposal Evaluation Criteria Matrix (Short-listed Firms), RFP 3-2700 Biological Preserve Monitoring Services
- D. Contract History for the Past Two Years, RFP 3-2700 Biological Preserve Monitoring Services

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