




***April 3, 2017***

**To:** Regional Planning and Highways Committee

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

**Subject:** Agreement for Regional Modeling-Traffic Operations On-Call Support Staffing

### ***Overview***

Consultant support staffing for traffic engineering services is needed to support the implementation of the Measure M2 Regional Traffic Signal Synchronization Program over the next three years. Proposals have been received and evaluated in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Approval is requested to execute a new agreement for these services.

### ***Recommendations***

- A. Approve the selection of W. G. Zimmerman Engineering, Inc., as the firm to provide on-call support staffing on an as-needed basis for regional modeling-traffic operations.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-6-1493 between the Orange County Transportation Authority and W. G. Zimmerman Engineering, Inc., in the amount of \$400,000, for a two-year initial term through April 30, 2019, with one, two-year option term to provide on-call support staffing on an as-needed basis for regional modeling-traffic operations.

### ***Discussion***

The Orange County Transportation Authority (OCTA) has been designated by the local agencies to administer and lead over 20 regionally significant traffic signal synchronization projects. These 20 projects are currently underway or in early development.

Staff has limited resources to provide this service to local agencies in support of the Regional Traffic Signal Synchronization Program (RTSSP) and requires assistance from an on-call consultant. The contracted support staff, which includes two on-site engineers and off-site support staff, will provide OCTA with adequate coverage and the ability to engage and deliver simultaneous traffic signal synchronization projects to meet the delivery schedules and to assist staff in day-to-day tasks required as part of the signal synchronization projects.

### ***Procurement Approach***

This procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for professional and technical services. Various 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 staffing and project organization, prior experience with similar projects, work plan, as well as cost and price.

On November 22, 2016, the Request for Proposals (RFP) 6-1493 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on November 22 and 29, 2016. A pre-proposal conference took place on November 29, 2016, with eight attendees representing six firms. Addendum No. 1 was issued to provide a copy of the pre-proposal registration sheet and presentation.

On December 20, 2016, two proposals were received. An evaluation committee comprised of OCTA staff from the Contracts Administration and Materials Management, Strategic Planning, and Transportation Planning departments, as well as external representatives from the cities of Anaheim and Lake Forest met to review all proposals received.

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

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

Several factors were considered in developing the criteria weights. Staffing and project organization, as well as work plan were each weighted at 30 percent. The proposed project team needed to demonstrate previous experience in all areas specified in the scope of work, stability with the firm, and sufficient allocation of resources to perform the work. The work plan was also of equal importance as the proposing firm had to demonstrate its understanding of the project

requirements, outline its technical approach to managing the signal synchronization projects with adequate support, and completing traffic-related assignments. The qualifications of the firm were weighted at 20 percent, as the firm must have experience working on similar signal synchronization projects. Cost was weighted at 20 percent to ensure OCTA receives competitive pricing.

On January 17, 2017, the evaluation committee reviewed the proposals received based on the evaluation criteria and conducted interviews with both firms listed below.

Firm and Location

KOA Corporation (KOA)  
Orange, California

W. G. Zimmerman Engineering, Inc. (WGZE)  
Huntington Beach, California

The interviews consisted of a presentation, which focused on the firms' approaches to providing support staffing for regional modeling-traffic operations. The firms' project managers and key team members had an opportunity to present qualifications and respond to the evaluation committee's questions. Questions were asked relative to the RTSSP projects and requirements, experience with transportation software modeling programs, as well as specific clarification questions related to their proposal. After the interviews, the evaluation committee met to complete the evaluation.

At the conclusion of the interviews, firms were requested to submit a best and final offer (BAFO) to provide more competitive pricing as the firms' proposed hourly rates were higher than the rates OCTA currently pays for these services. Both firms made adjustments to their hourly rates.

After considering the responses to the questions asked during the interviews and the information provided in the BAFOs, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores. However, the overall ranking of the firms did not change as a result of the interviews and BAFOs.

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

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Qualifications of the Firm

Both firms are qualified and demonstrated experience working on traffic signal synchronization projects.

WGZE is the incumbent firm and has been providing support staffing to OCTA since 2012. The firm has been providing traffic, transportation, and civil engineering services since 1995. The firm is located in the City of Huntington Beach and has 11 employees. WGZE's past work is primarily with public agencies in Southern California, such as the cities of Signal Hill and Mission Viejo, the County of Los Angeles, as well as OCTA. WGZE demonstrated familiarity with OCTA's signal synchronization program and process including funding guidelines, Measure M2 (M2) application reviews, issuing cooperative agreements and contract task orders, as well as agency coordination. The firm proposed to utilize the same subcontractor, Land CM Corp. (Land CM), to provide project management support. Land CM is experienced in managing projects in compliance with M2, state, and federal funding requirements.

KOA was founded in 1987 and provides traffic engineering, transportation planning, and construction management services. Although the firm described relevant experience as it has worked on various traffic signal synchronization-related projects with public agencies, such as OCTA, the cities of Buena Park and Long Beach, KOA lacked familiarity with OCTA's annual Comprehensive Transportation Funding Program (CTFP) Guidelines and experience providing on-site staff support similar in nature to that requested for this project.

Staffing and Project Organization

WGZE proposed two on-site engineers that have an average of three years of experience and have been providing the same support services to OCTA, which includes developing a document control and file management system, providing support in developing corridor projects funded through M2, interagency coordination, and assisting with the execution of cooperative agreements and contract task orders. WGZE proposed the required number of on-site personnel as specified in the scope of work. The proposed junior engineer to provide Roadway Operations and Analysis Database System (ROADS) software support has three years of experience and is familiar with handling ROADS data requests, importing and exporting data from ROADS, and using the ROADS web interface. The project manager has 30 years of experience in project management, traffic signal design, and corridor traffic signal timing.

WGZE's proposed project team demonstrated a broad range of experience and proposed sufficient staff support to OCTA. During the interview, the project team discussed its understanding of RTSSP proficiency with transportation software modeling programs, and OCTA's role as the lead agency. The team provided thorough responses, which assured the evaluation committee of the project team's knowledge and expertise.

KOA proposed an experienced project team. Although two on-site staff are required, the firm proposed only one on-site engineer. The individual has four years of experience, which includes signal design and synchronization projects, planning studies, and funding applications. The same individual is also proposed to provide ROADS support. The proposed project manager has 24 years of transportation engineering and planning experience, and has worked on multiple OCTA projects. During the interview, the project team demonstrated its knowledge related to traffic signal synchronization projects and transportation software modeling programs, but demonstrated limited knowledge of the annual CTFP Guidelines, which is an important part of the RTSSP projects.

#### Work Plan

WGZE presented a comprehensive work plan that addressed all elements of the scope of work. The firm demonstrated a clear understanding of the project requirements and discussed its approach to meeting those objectives. The firm described its management approach, which includes holding bi-monthly project meetings, maintaining a project schedule, monitoring the budget, and providing quality assurance. The on-site staff will provide the traffic engineering support, including assisting local agencies with project requirements, managing project-related contracts, and administering database management. WGZE also discussed staff's responsibilities in providing civil and traffic design services as needed, such as maintaining the ROADS database, performing field inspections related to signal design, construction, and operations, and using transportation software modeling programs like VISTRO, Synchro, and Tru-Traffic.

KOA's work plan demonstrated an understanding of the project requirements. The firm discussed the tasks to be performed by the on-site engineer, its project management approach, and services to be provided by professional and engineering staff. The firm also proposed applying automated tools developed to streamline tasks for the various software programs, such as Synchro, ArcGIS, and Excel. However, the evaluation committee had concerns regarding the on-site engineer's ability to complete all tasks that should be allocated among three individuals, as identified in the scope of work.

Cost and Price

Pricing scores were based on a formula that assigns the highest score to the firm with the lowest weighted average hourly rate, and scores the other proposals' weighted average hourly rates based on their relation to the lowest weighted average hourly rate. WGZE proposed a lower weighted average hourly rate and scored higher than KOA. However, KOA's weighted average hourly rate was competitive.

Procurement Summary

Based on the evaluation of the written proposals, the firms' qualifications, as well as information obtained from the interviews and BAFOs, the evaluation committee recommends the selection of WGZE as the top-ranked firm to provide support staffing for regional modeling-traffic operations. WGZE delivered a comprehensive proposal and an interview that was responsive to the requirements of the RFP.

Fiscal Impact

This project was approved in OCTA's Fiscal Year 2016-17 Budget, Planning Division, Accounts 0017-7519-SP001-P33 and 0017-7519-SP001-P2U, and is funded through the Orange County Local Transportation Authority.

***Summary***

Based on the information provided, staff recommends the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-6-1493 between OCTA and WGZE, in the amount of \$400,000, for a two-year initial term, effective through April 30, 2019, with a one two-year option term, to provide on-call support staffing in support of OCTA-led signal synchronization projects.

***Attachments***

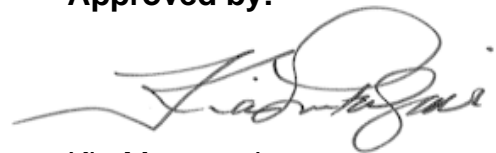
- A. Review of Proposals - Request for Proposals 6-1493 Regional Modeling - Traffic Operations Support Staffing
- B. Proposal Evaluation Criteria Matrix - Request for Proposals 6-1493 Regional Modeling - Traffic Operations Support Staffing
- C. Contract History for the Past Two Years - Request for Proposals 6-1493 - Regional Modeling - Traffic Operations Support Staffing

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