




**January 5, 2017**

**To:** Regional Planning and Highways Committee  
**From:** Darrell Johnson, Chief Executive Officer   
**Subject:** Consultant Selection for the Active Transportation Plan

### **Overview**

Consultant services are needed to develop the first countywide Active Transportation Plan. This plan will consolidate local and regional bikeway master planning efforts, and will identify and prioritize potential pedestrian improvements countywide. Proposals have been received and evaluated 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 perform the required work, and to authorize the Chief Executive Officer to negotiate and execute an agreement.

### **Recommendations**

- A. Approve the selection of IBI Group as the firm to develop the Orange County Active Transportation Plan.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-6-1417, between the Orange County Transportation Authority and IBI Group, in the amount of \$350,000, for an 18-month term through July 31, 2018, to develop the Orange County Active Transportation Plan.

### **Discussion**

The Active Transportation Plan (AT Plan) will continue to foster the collaboration between the Orange County Transportation Authority (OCTA), Orange County cities, the Orange County Council of Governments (OCCOG), the County of Orange, and the California Department of Transportation (Caltrans) to identify needs and plan for improvements to the countywide active transportation network.

As of May 2015, few cities have started or completed a pedestrian plan. The AT Plan will perform analysis to identify pedestrian improvement areas and will incorporate regional and local bikeway planning work conducted to date by OCTA and local jurisdictions.

Once completed, the AT Plan will provide a broad-based strategic planning tool to help ensure local and regional bicycle and pedestrian improvement efforts are considered and coordinated. This will alleviate the need for each city to develop individual AT Plans, unless desired locally. The development of the countywide AT Plan will also allow all 35 jurisdictions in Orange County to be eligible for future statewide Active Transportation Program funding.

Community participation and input will be a key factor during the preparation of the AT Plan to help move projects toward implementation. Staff will provide regular updates to the Board of Directors (Board) during the plan development, which is anticipated to take 18 months.

### ***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. The award is recommended to the firm offering the most comprehensive overall proposal, considering factors such as staffing and project organization, prior experience with similar projects, the work plan, and a fair and reasonable cost and price.

On September 15, 2016, the Request for Proposals (RFP) 6-1417 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on September 15 and 19, 2016. A pre-proposal conference took place on September 22, 2016, with 27 attendees representing 24 firms. Addendum No. 1 was issued to provide a copy of the pre-proposal presentation and registration sheet. Addendum No. 2 was issued to respond to questions related to the RFP.

On October 12, 2016, nine proposals were received. An evaluation committee consisting of OCTA staff from the Contracts Administration and Materials Management and the Strategic Planning departments, as well as external representatives from the City of Santa Ana and Caltrans met to review all proposals received. The proposals were evaluated based on the following evaluation criteria and weights:

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

Several factors were considered in developing the evaluation criteria weights. The work plan was assigned the greatest importance, as it was imperative for the selected firm to demonstrate a clear project approach and understanding of the project through a detailed work plan. The study will rely on an effective work plan that engages the community and provides high-quality, meaningful deliverables by detailing the best approach to performing each task effectively. The qualifications of the firm, as well as staffing and project organization criteria, were weighted equally at 25 percent. The proposing firm needed to clearly demonstrate the proposed project team's relevant experience and the requisite personnel to perform the various assignments set forth in the scope of work. Additionally, the proposed project team needed to demonstrate the ability to identify pedestrian focus areas to produce a document for future use by local agencies.

Cost and price was weighted at 20 percent to ensure the program will be delivered efficiently and that OCTA receives value for the services provided.

Based on the evaluation criteria, on October 12, 2016, the evaluation committee reviewed all proposals received and short-listed the four firms listed below in alphabetical order:

Firm and Location

Alta Planning + Design (Alta)  
San Diego, California

IBI Group (IBI)  
Fresno, California

STC Traffic, Inc. (STC)  
Diamond Bar, California

Steer Davies Gleave (SDG)  
Los Angeles, California

The interviews with the four firms were conducted on November 14, 2016, and consisted of a presentation to demonstrate the firms' understanding of OCTA's requirements for this project. 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 project team's experience developing outreach events, soliciting community input for non-technical audiences, approach to developing pedestrian focus areas, as well as key challenges to completing the AT Plan. Finally, each team was asked specific clarification questions related to their proposal.

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

Based on the evaluation of the written proposals, the firms' qualifications, the proposed firm-fixed rates, and the information obtained from the interviews, the evaluation committee recommends IBI for consideration of the award. The following is a brief summary of the proposal evaluation results.

#### Qualifications of the Firm

Each of the four firms demonstrated experience developing active transportation plans.

IBI has more than 40 years of experience providing transportation planning services for a wide range of public and private organizations. IBI's proposal and interview demonstrated comprehensive knowledge and experience in the design, planning, and programming of bicycle pedestrian facilities and plans. IBI has over 2,700 employees in 80 offices domestically and internationally.

IBI's proposed project team has spearheaded multiple community transportation planning projects with numerous federal, state, and local public agencies, such as the East Wilshire Avenue Bicycle Boulevard Study with the City of Fullerton, and various OCTA projects, such as the Fourth District Bikeways Collaborative and Strategic Plan, and the 2010 Long Range Transportation Plan. The firm's proposed landscaping subcontractor, KTU+A, has provided landscaping and transportation planning services for various projects, such as the City of Dana Point's Connectivity Study, and the City of Santa Ana's Downtown Complete Streets Plan. The firm's proposed planning and design subcontractor, PlaceWorks, prepared multiple grant applications to obtain millions of dollars to fund bicycle and multimodal infrastructure improvements and programs for the Glendale Bicycle Program. Lastly, the firm proposed communication outreach subcontractor, Arellano Associates, has conducted various outreach tasks and events to support a variety of similar projects including: developing a public participation plan for the OC Loop Segments D, F, and H; developing a community-based planning process for the City of Fontana's AT Plan; and is currently conducting strategic regional bikeways plans for OCTA's District 3 Bikeways Collaborative Project.

Alta, STC, and SDG demonstrated experience providing various community transportation planning projects. Their lists of past projects demonstrated a good sampling of the types of services each firm provides. Alta has significant experience through various projects which include aspects of bicycle and pedestrian planning and community outreach for many municipalities.

Furthermore, Alta demonstrated the highest number of relevant bicycle and pedestrian projects throughout Orange County. SDG demonstrated relevant experience on international transportation projects and one large local project to prepare the OCCOG Complete Streets Initiative.

STC's proposal and interview did not provide the same level of detail as the other proposals with respect to the level of involvement by the proposed project team on work cited as related past experience.

#### Staffing and Project Organization

All four firms proposed project teams with experience in delivering transportation planning projects. Many of the key staff proposed by each firm have worked with OCTA on previous projects, either as prime contractors or subcontractors.

IBI proposed a project team of personnel with up to 25 years of experience providing active transportation services. The proposed project manager has 16 years of experience in transportation planning and traffic engineering. In addition, the proposed project manager has local active transportation planning experience, including preparation of bicycle master plans for the City of Fullerton and complete streets plans for Orange County, as well as conceptual and design efforts for bicycle facilities in the cities of Bakersfield, Moreno Valley, and Yucaipa. The proposed project manager has also participated in public outreach activities.

IBI proposed several experienced individuals for the main aspects of this project including active transportation planning, project and community planning, pedestrian and bicycle opportunities, as well as public outreach. Several proposed key individuals have more than 20 years of experience in the industry, as well as multilingual capabilities and familiarity with Orange County. During the interview, the firm was asked to describe the key personnel's experience working as a team. The response clearly identified that the proposed project manager has worked with a majority of the proposed key personnel through various projects such as the East Wilshire Avenue Bicycle Boulevard Study in the City of Fullerton, and the Master Bicycle Plan in the City of Moreno Valley. Through their written proposal and interview, the team best demonstrated their technical understanding of individual responsibilities and expected levels of outreach responsibility for all key personnel. Furthermore, responses to questions asked during the interview were thorough and concise, with all individuals present participating, which validated the team's experience and familiarity performing the services.

Both STC and SDG proposed experienced project teams. SDG's project manager brings over ten years of experience, and STC's project manager has over 20 years of experience. SDG's proposed project team is going through a rebuilding period, and many of their key personnel have minimal experience working as a team. The majority of STC's key staff have a large amount of transportation experience; however, only a few members have experience with transportation planning in California.

Alta proposed a project manager with two years of experience, and a principle-in-charge with 16 years' experience in active transportation and bike plan projects. However, during the interview, there was minimal involvement from many representatives present, and the responses from the lead analyst/senior planner demonstrated very limited experience in the engineering component of active transportation planning.

#### Work Plan

The work plans proposed by each firm met the requirements of the RFP. Each firm proposed a work plan reflecting its understanding of the project requirements and accurately outlined a timeline for each task with estimated labor hours per person. All four firms addressed various methods of approaching non-technical audiences, such as, but not limited to, engaging disadvantaged and underserved communities, coordinating public outreach events such as pop-up tents, market place surveys, and attending existing health-related events. The four firms addressed the primary elements of the scope of work.

IBI's work plan was detailed and very comprehensive in all aspects of the RFP. IBI proposed to tailor communications with different communities. The outreach approach included bike tours, walking audits, and measureable goals to ensure a sufficient amount of surveys are received. The preferences and demographics of an area will determine if the prominent form of communication will be outdoor community events, a mobile application, or a different option to spread the awareness. Finally, IBI demonstrated understanding of Orange County's diversity, assumed a standard survey approach may not be ideal for every area, and proposed to adapt their plan appropriately to ensure a successful outcome. IBI demonstrated a clear understanding of the scope of work and the degree of involvement necessary to deliver all of the elements of a successful active transportation plan.

STC's work plan was also very comprehensive and provided a high level of detail. Alta provided a comprehensive written work plan addressing all elements of the scope of work. However, during the interview, responses to several questions

regarding the work plan were general, and questions were not thoroughly addressed. Furthermore, during the interview Alta did not demonstrate an individualized approach to completing the public outreach component of the work plan, obtaining public feedback for transportation surveys, and identifying how the firm will approach the cities for buy-in of the plan.

#### Cost and Price

Pricing scores were based on a formula that assigns the highest score to the lowest total firm-fixed price for the tasks to be completed, and scores the other proposals' total firm-fixed prices based on their relation to the lowest total firm-fixed price. IBI's firm-fixed price was competitive among all proposing firms.

#### 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 IBI as the top-ranked firm to develop a countywide AT Plan. IBI demonstrated strong relevant experience and submitted a thorough and comprehensive proposal that was responsive to all requirements of the RFP. The firm presented a highly qualified staff and subconsultants that demonstrated a thorough understanding of the dynamics of active transportation planning.

#### Fiscal Impact

The project is included in the approved fiscal year 2016-17 budget for the Planning Division (Account 1535-7519-A4530-0A6). A state Active Transportation Program Cycle 2 grant is funding 80 percent, and the remaining 20 percent is funded through State Transportation Improvement Program Planning, Programming, and Monitoring funds, previously approved by the Board.

#### ***Summary***

Staff recommends that the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-6-1417, between OCTA and IBI, in the amount of \$350,000, for an 18-month term to develop a countywide AT Plan.

***Attachments***

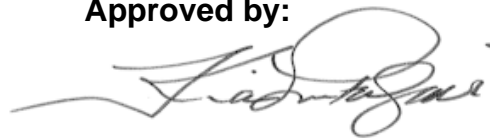
- A. Review of Proposals - RFP 6-1417 Orange County Active Transportation Plan
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms) - RFP 6-1417 Orange County Active Transportation Plan
- C. Contract History for the Past Two Years - RFP 6-1417 Orange County Active Transportation Plan

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