



**August 9, 2018**

**To:** Transit Committee

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

**Subject:** Consultant Selection for Program Management Consultant Services for Regional Rail Programs

### **Overview**

On March 26, 2018, the Orange County Transportation Authority Board of Directors authorized the issuance of a request for proposals for program management consultant services to support the development and delivery of regional rail programs in Orange County. Board of Directors' approval is requested for the selection of a firm to perform these services.

### **Recommendations**

- A. Approve the selection of HDR Engineering, Inc., as the firm to provide program management consultant services for regional rail programs.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-8-1512 between the Orange County Transportation Authority and HDR Engineering, Inc., for a term of five years, with one, two-year option term, to provide program management consultant services for regional rail programs.

### **Discussion**

The Orange County Transportation Authority (OCTA) continues to make capital investments in the OCTA-owned rail corridor and other investments to improve passenger rail service in Orange County. Current projects include the design and construction of the Placentia Metrolink Station and parking structure, Anaheim Canyon Station improvements, Fullerton Transportation Center elevators, Control Point Fourth Street, Orange Transportation Center parking structure, Orange County rail maintenance facility, Laguna Niguel to San Juan Capistrano passing siding, San Juan Creek bridge replacement, slope stabilization, and video surveillance systems. Future planned projects may include

track and signal improvements, grade separation, station rehabilitation, and other improvements that will benefit passenger rail service and system safety.

OCTA is seeking a qualified program management consultant (PMC) team to assist in the management and delivery of these projects through various phases, including oversight, planning, environmental clearance, engineering, right-of-way acquisition, and construction activities. OCTA is obligated to deliver these projects consistent with programmed funding and within scope, schedule, and budget. The PMC will provide technical expertise and staff assistance to help OCTA's staff with the development and management of capital projects.

### ***Procurement Approach***

This procurement was handled in accordance with Board of Directors (Board)-approved procedures for architectural and engineering (A&E) services that conform to both federal and state laws. Proposals are evaluated and ranked in accordance with the qualifications of the firm, staffing, project organization, and work plan. As this is an A&E procurement, price is not an evaluation criterion pursuant to state and federal laws. Evaluation of the proposals was conducted on the basis of overall qualifications to develop a competitive range of offerors. The highest-ranked firm is requested to submit a cost proposal, and the final agreement is negotiated. Should negotiations fail with the highest-ranked firm, a cost proposal will be solicited from the second-ranked firm in accordance with the Board-approved procurement policies.

On March 26, 2018, the Board authorized the release of Request for Proposals (RFP) 8-1512, which was electronically issued on CAMM NET. The RFP was advertised on March 26 and April 2, 2018, in a newspaper of general circulation. A pre-proposal conference was held on April 5, 2018, with 24 attendees representing 22 firms. Two addenda were issued to provide a copy of the pre-proposal conference registration sheets and presentation, provide responses to questions received, and address administrative issues related to the RFP.

On April 26, 2018, four proposals were received. An evaluation committee consisting of members from OCTA's Rail Programs, Transportation Planning, and Contracts Administration and Materials Management departments, and a representative from the Southern California Regional Railroad Authority (SCRRA) met to review all submitted proposals. The proposals were evaluated based on the following Board-approved evaluation criteria and weights:

- |                                     |            |
|-------------------------------------|------------|
| • Qualifications of the Firm        | 35 percent |
| • Staffing and Project Organization | 40 percent |
| • Work Plan                         | 25 percent |

The evaluation criteria are consistent with the weightings developed for similar procurements for PMC services. In developing these weights, several factors were considered. Staff assigned the greatest level of importance to the staffing and project organization criterion, as the qualifications of the project manager, key team members and the subconsultant teams must demonstrate the experience and ability in working with the railroads, as well as local, regulatory, and environmental agencies. The PMC's ability to manage and support a variety of capital projects within OCTA's regional rail programs is critical to a timely project delivery. Likewise, staff assigned a higher level of importance to the qualifications of the firm, which must be knowledgeable and experienced in the areas of work identified in the scope of work and be able to support the necessary level of effort over the term of the contract. The work plan criterion was used to evaluate teams' understanding of the regional rail programs' scope and challenges, and the approach to managing and implementing the various elements of the scope of work. As this is an A&E procurement, price is not an evaluation criterion, pursuant to state and federal laws.

The evaluation committee reviewed and discussed all proposals based on the evaluation criteria and found two firms most qualified to perform the required services. The two firms are listed below in alphabetical order:

Firm and Location

HDR Engineering, Inc. (HDR)  
Irvine, California

RailPros, Inc. (RailPros)  
Irvine, California

On June 27, 2018, the evaluation committee interviewed the two short-listed firms. The interviews consisted of a presentation to demonstrate the overall qualifications of each firm, highlight relevant rail and program management experience, and respond to evaluation committee questions. Each team's presentation addressed the requirements of the RFP, experience with the required tasks, and stressed the firm's commitment to the successful delivery of regional rail programs. Also highlighted were staffing plans, work plans, and perceived program challenges. Teams were asked general questions regarding its approach to manage the various projects, manage the overall program, coordination with various agencies, experience with similar PMC contracts, and enhancements in achieving OCTA's goals. The preliminary scores for both firms did not change as a result of the interview, and HDR remained as the top-ranked firm with the highest cumulative score.

Based on the evaluation of the written proposals and information obtained during the interviews, staff recommends HDR as the firm to provide PMC services for regional rail programs. HDR ranked highest among proposing firms because of the extensive experience of proposed personnel providing services on projects of similar scope and size. HDR submitted a comprehensive proposal demonstrating the firm's and subconsultants' qualifications and a detailed work plan, including an approach to each task supported by the firm's experience. HDR's proposal was supported by an excellent interview where the team provided well organized, detailed, and thorough responses to interview questions.

Both firms submitted proposals addressing the requirements of the RFP. Brief summaries of the evaluation results follow.

#### Qualifications of the Firm

Both short-listed firms are established firms with relevant experience and resources qualified to perform the program management scope of services required by this RFP. Both firms provided quality references.

HDR is a worldwide firm with a local office in the City of Irvine, providing an array of rail and program/project management services. As a subconsultant, HDR has provided services for OCTA's PMC for regional rail programs. Examples of relevant experience include efforts on the Anaheim Canyon Metrolink Station improvements and the Laguna Niguel to San Juan Capistrano Passing Siding projects. HDR continues to provide architectural, planning, and engineering services to SCRRA as the prime firm on the Metrolink general engineering consultant on-call contract with involvement on more than 90 contract task orders to date. HDR has experience working on projects with some of the proposed subconsultants, all of which are experienced in each of its respective fields.

RailPros is a nationwide firm with a local office in the City of Irvine. RailPros has wide-ranging expertise in the rail and transportation construction industry. As a subconsultant to OCTA on a previous PMC team, the firm provided management and engineering support services, with efforts on the Metrolink Service Expansion Project and the environmental phase on the Laguna Niguel to San Juan Capistrano Passing Siding project. RailPros has completed 22 projects for SCRRA's Metrolink on-call services contract, providing project and construction management services for projects involving positive train control system rehabilitation, amongst others. The subconsultants are experienced in each of its respective fields, and RailPros has experience working with some of the firms on previous projects.

### Staffing and Project Organization

Each short-listed firm proposed a team of qualified personnel with relevant rail and Federal Transit Administration (FTA) experience.

HDR's proposed project manager (PM) offers over 12 years of management experience in the design and construction of railroad and transit-related, FTA-funded infrastructure projects, successfully delivering over \$200 million in construction. Under OCTA's current rail PMC contract, the proposed PM has general contract administration/management support responsibilities. HDR has proposed highly-experienced technical leads for the planning, environmental, engineering, and construction management disciplines. The proposed engineering lead offers 41 years of experience in engineering design and construction, including 24 years of commuter rail project experience at SCRRA. Other personnel are well-qualified with technical expertise across the areas within the scope of work and demonstrated relevant experience working with stakeholders.

RailPros proposed a team of qualified staff. The proposed project manager has over ten years of experience in railroad program and project management, engineering design, and coordination. Examples of the proposed staffing relevant experience include program management support for the San Diego Association of Governments on the Los Angeles – San Diego – San Luis Obispo rail corridor projects, and design project manager for the Laguna Niguel to San Juan Capistrano Passing Siding project in the environmental phase. Overall, RailPros proposed qualified personnel with experience across many disciplines and relevant experience working with stakeholders.

### Work Plan

HDR and RailPros each proposed a detailed work plan addressing all elements of the scope of work, demonstrating an understanding of the required services and elements necessary for successful project management and provision of technical services. Both firms emphasized the importance of effective communication between OCTA staff, the consultant team, SCRRA, and all other stakeholders. Each firm identified potential challenges and solutions.

HDR's work plan was inclusive of all elements identified in the scope of work. Responsibility for each task was designated by key personnel and technical groups. A specific approach for the delivery of each task was provided, supported by specific project details where the HDR team successfully implemented each approach. The proposal includes a good discussion on potential issues critical to the program, with proposed solutions. The team also provided several value-added services, such as the ability to assist with grant funding applications and

support. Other necessary work plan elements were sufficiently addressed, such as quality control, budgeting, and project controls. HDR's proposal was supported by an excellent interview where the team provided well organized, specific, and thorough responses to interview questions.

RailPros' work plan provided a good approach to all elements of the scope of work. The proposal included a comprehensive project management plan with various elements and details, such as an issues resolution team. Key team member responsibilities were identified by task and associated deliverables. The team proposed solutions to two special issues. Examples of enhancements and innovations on previous projects were also discussed. Other work plan elements such as quality control, budgeting, and project controls were thoroughly addressed. Interview responses were not as detailed as those of the recommended firm.

#### **Procurement Summary**

Based on the evaluation of the written proposals, team qualifications, work plan, and information obtained from the interviews, the evaluation committee recommends the selection of HDR as the top-ranked firm to provide PMC services for regional rail programs. HDR presented a comprehensive proposal, a highly-qualified team of key personnel, resources to provide all required services, and demonstrated a thorough understanding of the overall regional rail programs.

HDR and its subconsultants, if selected as a result of the procurement, will be precluded from proposing on engineering, technical services, and/or construction-related work for projects, which the firm and its subconsultants would oversee on behalf of OCTA's regional rail programs for the term of the contract, as prescribed in the RFP.

#### **Fiscal Impact**

The project was approved in OCTA's Fiscal Year 2018-19 Budget, Capital Programs Division, Account 0017-7519-TR212-06P, and is funded with a combination of Measure M2, state, and federal funds.

#### **Summary**

Staff requests Board of Directors' approval for the Chief Executive Officer to negotiate and execute Agreement No. C-8-1512 with HDR Engineering, Inc., for a term of five years, with one, two-year option term, to provide program management consultant services for OCTA's regional rail programs.

***Attachments***

- A.    Review of Proposals, RFP 8-1512 Program Management Consultant Services for Regional Rail Programs
- B.    Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 8-1512 Program Management Consultant Services for Regional Rail Programs
- C.    Contract History for the Past Two Years, RFP 8-1512 Program Management Consultant Services for Regional Rail Programs

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