



January 10, 2019

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for Construction Management Services for the Anaheim Canyon Metrolink Station Improvement Project

Overview

On July 23, 2018, the Orange County Transportation Authority Board of Directors approved the release of a request for proposals to provide construction management services related to the construction of improvements at the Anaheim Canyon Metrolink Station. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the selection of Berg & Associates, Inc., as the firm to provide construction management services for the Anaheim Canyon Metrolink Station Improvement project.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-8-1760 between the Orange County Transportation Authority and Berg & Associates, Inc., as the firm to provide construction management services for the Anaheim Canyon Metrolink Station Improvement project.

Discussion

The Anaheim Canyon Metrolink Station (Station) is located on the Southern California Passenger and Freight Rail Network Olive Subdivision, which is owned by the Orange County Transportation Authority (OCTA). The Station is served by Metrolink's Inland Empire – Orange County Line. OCTA, the City of Anaheim (City), and the Southern California Regional Rail Authority (SCRRA) wish to make improvements at the Station that will include construction of a second main track and platform, lengthening of the existing platform, improvements to pedestrian circulation, and additional ticket vending machines, benches, and shade structures. The Station improvement project (Project) will increase the

capacity of the Station to accommodate additional rail service in the future, as well as improve reliability, on-time performance, and enhance safety.

On August 24, 2014, the OCTA Board of Directors (Board) approved Cooperative Agreement No. C-4-1714 with the City, and Cooperative Agreement No. C-4-1715 with SCRRA to define roles, responsibilities, and funding for the Project. OCTA is the lead agency on the design and construction phase of the Station improvements and track work; SCRRA is the lead agency on the design of the signal, communication systems, and positive train control, as well as design review and design support during construction. The City will also provide general design review.

The Project has been environmentally cleared through the California Environmental Quality Act and National Environmental Protection Act process, and final plans, specifications, and estimates are anticipated to be completed in early 2019.

The selected construction management (CM) firm will provide a review of the plans and specifications prior to advertisement for construction, and CM services, including quality inspections, acceptance testing, and other professional services as needed.

Procurement Approach

This procurement was handled in accordance with OCTA's 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 and 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 based on overall qualifications to develop a range of competitive 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 approved procurement policies.

On July 23, 2018, the Board authorized the release of Request for Proposals (RFP) 8-1760, which was electronically issued on CAMM NET. The Project was advertised on July 23 and 30, 2018, in a newspaper of general circulation. A pre-proposal conference was held on July 26, 2018, with 29 attendees representing 23 firms. Three addenda were issued to make available the pre-proposal conference registration sheets, provide responses to questions received, and handle administrative issues related to the RFP.

On September 11, 2018, six proposals were received. An evaluation committee consisting of staff from the Contracts Administration and Materials Management and Rail Programs departments, as well as representatives from SCRRRA and the City met to review all submitted proposals. The proposals were evaluated based on the following evaluation criteria and weights:

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

The evaluation criteria and weights are consistent with those developed for similar A&E procurements for CM services. In developing these weights, several factors were considered. The greatest importance was given to the staffing and project organization of the firm, as the qualifications of the project manager and resident engineer, as well as other key personnel are critical to the successful completion of the Project. Similarly, high importance was given to the work plan criterion to emphasize the importance of the team's understanding of the Project, its challenges, and its approach to implementing the various elements of the scope of work. The final criterion, qualifications of the firm, evaluated the firm's experience in performing work of a similar scope and size.

The evaluation committee reviewed and discussed all proposals based on the evaluation criteria and short-listed the two most qualified firms listed below in alphabetical order:

Firm and Location

AndersonPenna Partners, Inc. (APP)
Newport Beach, California

Berg & Associates, Inc. (Berg)
San Pedro, California

On October 9, 2018, the evaluation committee interviewed the two short-listed firms. The interviews consisted of a presentation, allowing each firm to present its qualifications, highlight its personnel, and respond to evaluation committee questions. In general, each team's presentation addressed the requirements of the RFP, highlighted the project team's experience in working on related projects, and stressed the firm's commitment to the success of the Project. Also highlighted were staffing plans, work plans, and perceived Project issues. Each firm was asked some general questions related to the potential challenges and risks of the Project, along with previous experience of handling contractor claims and disputes. In addition, each team was asked specific clarification questions related to its proposal. After considering the responses to the questions asked during the interview, the evaluation committee adjusted the preliminary scores for both firms; however, Berg remained as the top-ranked firm with the highest cumulative score.

Based on the evaluation of written proposals and information obtained from the interviews, staff recommends Berg as the firm to provide CM services for the Project. This firm ranked highest among the proposing firms because of the team's relevant experience in CM services for railroad projects and familiarity with SCRRA's requirements. Berg's proposed team consists of highly-qualified key personnel with relevant experience in rail-related CM services. The firm demonstrated an excellent understanding of the project requirements and presented a comprehensive work plan addressing key issues that are critical to the success of the Project. The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

Berg has been providing complete CM and inspection services for public agencies since 1980. The firm has 30 employees and six offices that are all located within California, including an office in the City. Berg has provided a variety of CM support services that include contract administration and engineering, project oversight, and quality assurance services to various public agencies, including SCRRA, Alameda Corridor Transportation Authority, and the City of Fullerton. The projects completed for these agencies had similar project characteristics to the Anaheim Canyon project, such as working within live railroad tracks, signal coordination, and construction of a new passenger platform within an active station. Berg has worked with OCTA on the Raymond Avenue Railroad Grade Separation project to provide CM services that include utility coordination, geotechnical engineering, and quality assurance services. Berg proposed to utilize three subconsultants to provide additional support in the areas of health and safety monitoring, surveying services, and soils and materials testing.

APP was founded in 2005 and specializes in providing construction, program and project management, construction inspection, and civil engineering design services. APP has 58 employees and four offices, which includes its headquarters office in the City of Newport Beach. The firm has experience working with OCTA on the State College Boulevard Grade Separation project and the Los Angeles – San Diego – San Luis Obispo Slope Stabilization project. APP has also worked with other public agencies, including the cities of Anaheim, Seal Beach, and Tustin, as well as the Irvine Ranch Water District and Costa Mesa Sanitary District. APP proposed to utilize six subconsultants to provide project controls services, rail inspection services, hazardous materials testing, soils and materials testing, quality assurance services, and safety and electrical inspection.

Staffing and Project Organization

Berg proposed a project team with relevant experience in the areas of station, rail, and structure project experience. The proposed project manager has 37 years of experience in all aspects of CM that range from the conceptual stage

through final construction, including Metrolink stations, track installations, and heavy rail improvements. The project team's key staff have worked together on several projects in the past, including the Burbank Airport North Metrolink Station project, Los Angeles Union Station Platform 7 Restoration project, and the Raymond Avenue Railroad Grade Separation project where similar services were provided. The project team's key staff members years of experience range from 20 years to 37 years, with expertise in CM, contract administration, engineering services, and documentation and compliance with the applicable standards and guidelines to ensure that all project activities are addressed and completed. During the interview, the project team discussed its roles on the Project and the tasks the project team would be responsible for handling, as well as responded to the evaluation committee's questions.

APP proposed a project team with experience in various disciplines of CM, civil engineering, and design services. The proposed project manager has 34 years of experience related to CM and civil engineering. The project team members have individually worked on related projects such as the State College Boulevard Railroad Grade Separation project, Sand Canyon Avenue Railroad Grade Separation project, and the Long Beach Transit Mall Improvements project. The project team's key staff members years of experience range from 13 years to 38 years, with expertise in design and CM. During the interview, the project team discussed the potential project issues and responded to the evaluation committee's questions, but did not expand on the project team's direct experience in working on projects of similar kind.

Work Plan

Berg presented a comprehensive work plan that addressed how the tasks of the scope of work would be completed. The firm demonstrated its understanding of the Project by presenting solutions to potential issues such as signal coordination, sound and dust pollution to nearby residents, and limited access to the Project site during construction. The work plan stated the importance of maintaining operations of the existing Station and controlling the traffic flow in the City's streets during construction of the Project. The firm discussed its approach for coordination efforts with the various project stakeholders, which include OCTA, the City, Metrolink, BNSF Railway, and utility companies. The firm also addressed the importance of safety while working within an active railroad corridor. The firm's approach to safety monitoring includes internally preparing a construction safety plan and reviewing the contractor's safety plan to ensure it complies and meets the applicable agencies' requirements. Berg proposed several enhancements, such as utilizing drone technology to survey and document construction progress, using specially created software to map the as-built progress in real time, and using mobile applications to improve efficiency on the Project. Additionally, during the interview, the firm detailed the

specific planning activities that would need to be completed for construction to begin.

APP presented its approach to providing CM services by discussing the various tasks that would be completed in its work plan. The firm discussed its understanding of the Project by sequentially breaking down the work activities that would be completed during the three construction phases, and identified special issues and possible solutions. Detailed discussion about the potential issues included the need for coordination with project stakeholders, traffic impacts, and working on, and next to a live railroad corridor. APP presented enhancements to the Project, such as daily inspector's reports to capture the work performed and pre-activity meetings to review the tasks that would need to be completed daily for better Project efficiency. During the interview, APP highlighted its approach to mitigating the Project issues by utilizing the team's experience in handling similar situations on previous projects.

Procurement Summary

Based on the evaluation of the written proposals and information obtained during the interviews, the evaluation committee recommends the selection of Berg as the top-ranked firm to provide CM services for the Project. Berg demonstrated outstanding relevant experience and submitted a comprehensive proposal that was responsive to the requirements of the RFP. Berg presented a detailed and thorough interview, supporting the firm's experience, staffing, work plan, and a thorough understanding of the overall Project.

Fiscal Impact

The Project is included in OCTA's Fiscal Year 2018-19 Budget, Capital Programs Division, Account 0018-9085-C-5061-0JR, and is funded with federal Congestion Mitigation and Air Quality Improvement funds.


Summary

Staff requests Board of Directors' approval for the Chief Executive Officer to negotiate and execute Agreement No. C-8-1760 with Berg & Associates, Inc., as the firm to provide construction management services for the Anaheim Canyon Metrolink Station Improvement project.

Attachments

- A. Review of Proposals, RFP 8-1760 Construction Management Services for the Anaheim Canyon Metrolink Station Improvement Project
- B. Proposal Evaluation Criteria Matrix (Short-Listed), RFP 8-1760 Construction Management Services for the Anaheim Canyon Metrolink Station Improvement Project
- C. Contract History for the Past Two Years, RFP 8-1760 Construction Management Services for the Anaheim Canyon Metrolink Station Improvement Project

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