




March 4, 2019

To: Regional Planning and Highways Committee
From: Darrell E. Johnson, Chief Executive Officer 
Subject: Consultant Selection for the Safe Routes to School Action Plan

Overview

Consultant services are required to develop the Safe Routes to School Action Plan. This plan will evaluate ongoing Safe Routes to School efforts countywide and develop an action plan for lead agencies and organizations to improve safety for youth walking and bicycling to school.

Proposals have been received and evaluated in accordance with the Orange County Transportation Authority's procurement procedures for architectural and engineering services. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the selection of Toole Design, LLC, as the firm to develop the Safe Routes to School Action Plan.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-8-1974 between the Orange County Transportation Authority and Toole Design, LLC, to develop the Safe Routes to School Action Plan.

Discussion

The Safe Routes to School (SRTS) Action Plan (Action Plan) will evaluate ongoing SRTS efforts countywide and develop a list of action items with clear definition of lead agencies and organizations. The plan aims to improve safety for youth walking and bicycling to school through collaborative efforts, promotion of transportation safety education, strengthening of education and enforcement partnerships, and advancing encouragement programs that will benefit families throughout the County.

A California Department of Transportation's (Caltrans) Sustainable Transportation Planning Grant Program was secured to implement the project in collaboration with Caltrans and the Orange County Health Care Agency (OCHCA). The grant will support Walk to School Day events, walk audits, identify key stakeholders countywide, and develop an action plan for next steps. The study scope includes demonstration of Walk to School Day events at ten schools throughout the County. Additionally, walk audits will be completed at the ten selected schools. This will better support local agency efforts to implement policy and engineering changes to serve students walking and biking to school. Local efforts could include improvements to pedestrian and bicyclist facilities, as well as non-infrastructure efforts such as school events and educational programs.

This study will continue to foster collaboration between the Orange County Transportation Authority (OCTA), OCHCA, the cities, the County of Orange, law enforcement agencies, and Caltrans. The Action Plan will be developed in partnership with local agencies and include an evaluation of current countywide SRTS efforts. Based on a collaborative program, recommendations will be developed for next steps (Action Plan), with clarity about the lead agency or organization. OCTA can provide support for some efforts, but enforcement activities, for example, would be led by local police department staff.

Engagement with local agency staff will ensure that the Action Plan empowers local agencies, schools, school districts, and community organizations to effectively implement programs and efforts supportive of walking and biking to school by students, parents, and guardians.

The Citizens Advisory Committee Bicycle and Pedestrian Subcommittee will be involved in preparation of the Action Plan. Staff will provide regular updates to the Board of Directors (Board) during the plan development, which is anticipated to take 24 months.

Procurement Approach

This procurement was handled in accordance with OCTA's Board-approved procedures for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering factors such as staffing and project organization, qualifications, prior experience with similar projects, and work plan, as well as cost and price.

On October 2, 2018, Request for Proposals (RFP) 8-1974 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on October 1 and 8, 2018. Two addenda were issued to provide responses to questions received on the RFP and make clarifications relative to the RFP.

On November 1, 2018, seven proposals were received. An evaluation committee comprised of staff from Contracts Administration and Materials Management and Transportation Planning departments, as well as external representatives from OCHCA and Caltrans met to review the submitted proposals. The proposals were evaluated using the following evaluation criteria and weights.

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

In developing these weights, several factors were considered, giving high importance to qualifications of the firm to evaluate the firm's experience in performing work of a similar scope and size, as well as staffing and project organization, as the qualifications of the project manager and other key personnel are very important to the successful and timely delivery of the project. Equally weighted was the work plan, cost, and price criteria 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 work plan and technical approach to the project is critical to the successful performance of the project, and cost and price ensures OCTA receives value for the services provided.

The evaluation committee reviewed and discussed all proposals received based on the evaluation criteria and short-listed three firms to be interviewed. The three most qualified firms are listed below in alphabetical order:

Firm and Location

Alta Planning + Design (Alta)
Los Angeles, California

KOA Associates (KOA)
Orange, California

Toole Design Group, LLC (Toole)
Oakland, California

On December 19, 2018, the evaluation committee interviewed the three short-listed firms. The interviews consisted of a presentation allowing each team to present its qualifications, highlight its proposal, and respond to evaluation committee questions. Questions were asked relative to the proposed project team's experience in school walk audits, community engagement plans with

regional agencies, each firm's approach to developing final reports, as well as discussing key challenges to completing this SRTS project.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and adjusted individual scores. The rankings did not change.

Based on the evaluation of written proposals and interviews, the evaluation committee recommends Toole for consideration of the contract award. The following is a summary of the proposal evaluation results.

Qualifications of the Firm

The three short-listed firms are established firms with relevant experience and qualifications related to development of similar SRTS plans.

Toole was established in 2003 and has experience working on SRTS plans at the local, state, and national levels. The firm managed a statewide SRTS plan for the Ohio Department of Transportation and other similar action plans for the Boston Public Health Commission and the City of Seattle. The firm manages a contract for education and outreach services for the Alameda County Transportation Commission and helped develop the Federal Highway Administration guidance for the federal SRTS Program. Toole is also working with the City of Austin, Texas Public Works to develop an SRTS Infrastructure Plan.

Alta was established in 1996 and has over 18 years of SRTS-related experience assisting schools, school districts, and other jurisdictions. The firm developed Santa Ana's "Travel Safe, Share the Space Bicycle" safety campaign, Los Angeles Metropolitan Transportation Authority's SRTS Pilot Program, as well as the City of Los Angeles' "Walk to School Day." The firm also provided related services for the cities of Claremont, Lawndale, and Rialto in California.

KOA Corporation was established in 1987 and provides traffic engineering, transportation planning, and construction management services for public agencies and private sector clients. The firm recently developed a number of SRTS programs for the Town of Apple Valley, and the cities of Barstow, Burbank, Garden Grove, Irvine, San Jacinto, and South Gate in California.

Staffing and Project Organization

The firms proposed qualified project managers and key personnel with relevant SRTS experience.

Toole presented a staffing plan that proposed a multidisciplinary team, including the proposed subconsultants who worked on many projects together. Toole's project manager is a transportation planner who served as Washington Metropolitan Area Transit Authority's SRTS Coordinator for 11 years, and most recently managed the State of Virginia's SRTS Program. The deputy project manager recently served as the principal project coordinator at the Los Angeles Department of Transportation where he oversaw the SRTS program and currently works on the Caltrans Active Transportation Plan in the City of Los Angeles. The principal-in-charge has managed over 40 projects and has experience in active transportation policy, planning, and engineering projects. Other previous projects include the City of Alameda SRTS program, SRTS Launch Program in Orange County, SRTS assessments/trainings in Orange County, and the cities of Montclair and Portland SRTS programs. The interview demonstrated the team's expertise and understanding in the development of SRTS programs.

Alta proposed a qualified team that includes a principal-in-charge with 20 years of experience as a transportation planner and manager. The principal-in-charge is currently involved with the Culver City La Ballona Elementary Protected Bike Lane and SRTS Project. His relevant background includes SRTS projects for the cities of Chula Vista, National City, and Santa Ana. The project manager has worked on various SRTS projects as well, including the City of Santa Ana SRTS Plan, Santa Ana Travel Safe, Share the Space Bicycle Safety Campaign, and the City of Claremont SRTS Project. The overall staff availability was lower than other proposals. The firm provided responses to all questions during the interview.

KOA proposed qualified key personnel. The proposed project manager has 13 years of experience in the transportation planning field and has managed and worked on various SRTS or similar projects throughout Southern California, such as the City of Garden Grove SRTS, San Bernardino County Transportation Authority SRTS, and OCTA's Bikeway Strategy and feasibility studies. The principal-in-charge has 25 years of experience and has worked with City of Indio SRTS and Town of Apple Valley SRTS.

Work Plan

The firms' proposed work plans met the requirements of the RFP and effectively discussed the approach to completing the SRTS.

Toole presented a comprehensive work plan that detailed its project understanding and approach with emphasis on outreach. The proposal discussed both short-term and long-term strategies, such as championing constituent participation, walk-to-school-day events, and provided additional recommendations not considered in the scope. During the interview, the firm elaborated on its approach regarding community engagement with local agencies like Caltrans and the Southern California Association of Governments, schools, law enforcement agencies, other stakeholders, and provided examples of where its approach was used in the past with much success. The proposed effort was more in alignment with OCTA's scope of work than other proposals.

Alta's work plan demonstrated an understanding of the project objectives, and the firm presented a detailed approach to completing the work as outlined in its project sequence flow chart. The work plan addressed all aspects of the scope of work in detail with examples of final work products created from previous projects.

KOA's proposal demonstrated knowledge of Orange County's political and socioeconomic landscape that would determine what areas would benefit most with SRTS plans. The firm provided plans for stakeholder targets, but was missing details regarding data analysis and tiered school analysis required by the scope of work. The firm answered all interview questions.

Cost and Price

Pricing scores were based on a formula, which assigned the highest score to the lowest firm-fixed price for the three-year term and scored the other proposals' firm-fixed price based on their relation to the lowest firm-fixed price. Toole's proposed firm-fixed price is deemed fair and reasonable as it is competitive among the prices proposed by the other firms and is within the OCTA project manager's independent cost estimate.

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 Toole as the top-ranked firm to develop the SRTS Action Plan. Toole submitted a comprehensive proposal that was responsive to all requirements of the RFP and, in the interview, the firm further highlighted Toole's experience, staffing experience, and technical approach to the work plan.

Fiscal Impact

The project is included in the approved fiscal year 2018-19 budget for the Planning Division (Account 1531-7519-A4530-18Y). The Caltrans Sustainable Transportation Planning Grant Program is funding 88 percent and the remaining 12 percent is funded through State Transportation Improvement Program funds previously approved by the Board.

Summary

Staff requests Board approval for the Chief Executive Officer to negotiate and execute Agreement No. C-8-1974 with Toole as the firm to develop the SRTS Action Plan.

Attachments

- A. Review of Proposals, RFP 8-1974 Safe Routes to School Action Plan
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 8-1974 Safe Routes to School Action Plan
- C. Contract History for the Past Two Years, RFP 8-1974 Safe Routes to School Action Plan

Prepared by:



Paul Martin
Active Transportation Coordinator
(714) 560-5386

Approved by:



Kia Mortazavi
Executive Director, Planning
(714) 560-5741



Virginia Abadessa
Director, Contracts Administration and
Materials Management
(714) 560-5623