



April 22, 2019

To: Members of the Board of Directors

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Approval to Release Request for Proposals for On-Call Real Property Appraisals and Related Services

Overview

The Orange County Transportation Authority has developed a request for proposals to initiate a competitive procurement process to retain on-call consultants for appraisals and related services for highway, environmental mitigation, commuter rail, and transit projects.

Recommendations

- A. Approve the proposed evaluation criteria and weightings for Request for Proposals 9-0995 for the selection of consultant services to provide on-call real property appraisals and related services.
- B. Approve the release of Request for Proposals 9-0995 for on-call real property appraisals and related services.

Discussion

The Orange County Transportation Authority (OCTA) requires on-call consultants to provide real property appraisals and other related services necessary for public transportation projects involving roadways, highways, freeways, railroad corridors, commuter rail, transit services, and land conservation for environmental mitigation and OCTA-owned facilities. The consultants will also be required to provide additional services in such disciplines as loss of business goodwill, furniture, fixtures, machinery and equipment, appraisal review, and expert witness.

The appraisal process is necessary to determine the fair market value of the properties and to ensure that all property owners are treated fairly and equitably. The appraisal process is also one of the first steps necessary to initiate the real property acquisition process.

Procurement Approach

OCTA's procurement procedures and policies require that the Board of Directors (Board) approve all requests for proposals (RFP) over \$1,000,000, as well as approve the evaluation criteria and weightings. Staff is submitting for Board approval the draft RFP and the evaluation criteria and weightings, which will be used to evaluate proposals received in response to the RFP.

The contracts resulting from this solicitation will have a five-year term. Specific work assignments will be awarded as time and expense contract task orders (CTOs). Technical and price proposals will be solicited competitively from the selected on-call firms, and CTOs will be awarded based upon a firm's technical capabilities and understanding of the work assignment and price.

The following evaluation criteria and weights are as follows:

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

Several factors were considered in developing the criteria weightings. Staff assigned the greatest importance to qualifications of the firm to emphasize the importance of the firm demonstrating experience in performing a variety of right-of-way appraisal work. Staffing and project organization were assigned a weighting of 25 percent to emphasize the staff's understanding of and experience performing real property appraisals, and a variety of related appraisals. Cost and price were weighted at 25 percent to ensure hourly rates remain competitive. The work plan was weighted the lowest at 20 percent, as each CTO issued will define the specific scope of work. However, it is still important that the firms demonstrate understanding of the potential projects.

The RFP will be released upon Board approval of these recommendations.

Fiscal Impact

The Project is included in OCTA's proposed Fiscal Year 2019-20 Budget, Capital Programs Division, Account 0017-M0201-F17-7514 and utilizes a combination of Federal Highway Administration, Federal Transit Administration, and local funds.

Summary

Board of Directors' approval is requested to release Request for Proposals 9-0995 for on-call real property appraisals and related services for highway, environmental mitigation, commuter rail, and transit projects.

Attachment

- A. Draft Request for Proposals 9-0995, On-Call Real Property Appraisals and Related Services

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