




**February 20, 2020**

**To:** Legislative and Communications Committee

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

**Subject:** Agreement for Public Communications and Community Outreach Consultant Services for the Interstate 405 Improvement Project between State Route 73 and Interstate 605

### **Overview**

On October 28, 2019, the Board of Directors approved the release of a request for proposals for continued public outreach consulting services during the construction phase of the Interstate 405 Improvement Project between State Route 73 and Interstate 605. Proposals were received in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for these services.

### **Recommendations**

- A. Approve the selection of Kleinfelder Construction Services, Inc., as the firm to provide public outreach consulting services for the Interstate 405 Improvement Project between State Route 73 and Interstate 605.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1571 between the Orange County Transportation Authority and Kleinfelder Construction Services, Inc., in the amount of \$3,326,544, for a four-year term, effective May 1, 2020, through April 30, 2024, with an option term of up to 24 months, to provide public outreach consulting services for the Interstate 405 Improvement Project between State Route 73 and Interstate 605.

### **Discussion**

The Orange County Transportation Authority (OCTA), in cooperation with the California Department of Transportation (Caltrans), is improving the Interstate 405 (I-405) between State Route 73 (SR-73) and Interstate 605 (I-605). The \$1.9 billion I-405 Improvement Project (Project) is

adding one regular lane in each direction between Euclid Street and I-605, and a second lane in each direction in the center of the freeway from SR-73 to I-605 that will combine with the existing carpool lanes to form the 405 Express Lanes. The Project includes replacing 18 bridges, widening more than a dozen structures, and building a new Express Lanes connector between SR-73 and I-405. The 16-mile Project also includes construction of 170 sound walls and retaining walls, many of which require direct coordination with residents during construction.

A consultant is currently providing public outreach services to OCTA under an agreement set to expire June 30, 2020. Given the Project scope, complexity, and relevance to the commuting public and major stakeholders, Board of Directors' (Board) approval is requested for a consultant to continue public outreach efforts during the construction phase of the Project and to keep pace with the accelerated nature of a design-build project. More than 10,000 residential and commercial parcels are located within a quarter-mile radius of the Project area, which encompasses seven cities, as well as the community of Rossmore. Thousands of residents live adjacent to I-405, and hundreds of thousands of motorists utilize the corridor each day. Extensive outreach efforts are ongoing and need to continue in order to communicate major activities such as bridge closures and demolition, road and freeway closures, and wall and roadway construction.

These consultant services will support continued development and delivery of daily communications regarding temporary construction impacts, as well as advance public information messages to help the public understand the value and benefits of investing in Orange County's transportation network. The selected consultant will continue implementation of the existing comprehensive I-405 public outreach program. The consultant will use a variety of methods and tools, including one-on-one meetings with elected officials, key stakeholders and members of the business, ethnic, and faith communities; city council and speakers bureau presentations; email newsletters; automated calls; neighborhood meetings; a mobile application; an interactive closures and detours map; and a Project website. In addition, the consultant will further develop the Project's strong social media presence, engaging numerous project stakeholders simultaneously.

### ***Procurement Approach***

The procurement was handled in accordance with OCTA's Board-approved procedures for professional and technical services. Various factors were considered in the award for professional and technical services. Award is

recommended to the firm offering the most comprehensive overall proposal considering such factors as prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On October 28, 2019, the Board authorized the release of Request for Proposals (RFP) 9-1571, which was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on October 28 and November 4, 2019. A pre-proposal conference was held on November 6, 2019, with 11 attendees representing eight firms. Three addenda were issued to handle administrative issues related to the RFP, make available the pre-proposal conference registration sheet and presentation, as well as respond to written questions related to the RFP.

On December 3, 2019, two proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, External Affairs, and Capital Programs, as well as external representatives from the City of Westminster and Caltrans met to review all proposals received.

The proposals were evaluated based on the following evaluation criteria and weightings:

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

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm was weighted at 30 percent as the firm had to demonstrate direct public outreach experience on large-scale, highly-complex transportation projects during construction phases. Staffing and project organization was also weighted at 30 percent as the firm had to present an experienced, well-rounded team with a blend of senior and junior level staff having adequate availability, as well as experience working on large construction projects. Work plan was weighted at 20 percent as the project team would continue implementation of the established comprehensive public outreach program for the Project. Additionally, the project team had to demonstrate an understanding of the project scope and challenges and level of effort required. Cost and price was also weighted at 20 percent to ensure the outreach program is delivered efficiently and that OCTA receives value for the services provided.



The evaluation committee utilized a best-value selection process for this RFP. The best-value determination is based on a 100-point scale. The RFP required proposing firms to submit a separate price proposal in a sealed package. In order to focus on the technical aspects of the proposals, the evaluation committee first evaluated the written proposals on technical merit based on the weighted criteria for qualifications of the firm, staffing and project organization, as well as work plan, which represented a maximum of 80 points of the total proposal score. Once the technical scores of the two proposals were determined, the sealed price proposals were then opened. The pricing score represented a maximum of 20 points of the total proposal score.

On December 18, 2019, the evaluation committee reviewed the two proposals received based only on the technical evaluation criteria. Interviews were conducted with both firms listed below in alphabetical order:

Firm and Location

Arellano Associates, LLC (Arellano)  
Chino Hills, California

Kleinfelder Construction Services, Inc. (Kleinfelder)  
Laguna Hills, California

The interviews took place on January 7, 2020, and consisted of a presentation to demonstrate the firms' understanding of OCTA's requirements. 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 related to the level of effort required for this Project, managing time and resource commitments, conducting multicultural outreach, potential challenges, and handling crisis communications. In addition, each team was asked specific clarification questions related to its proposal.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores. However, Kleinfelder remained the higher-ranked firm with the higher overall score.

Based on the evaluation of the written technical proposals and information obtained from the interviews, as well as pricing, the evaluation committee recommends Kleinfelder for consideration of the award. The following is a brief summary of the proposal evaluation results.



#### Qualifications of the Firm

Kleinfelder was founded in 1986 and has 76 employees. The firm is headquartered in the City of San Diego with multiple locations, including an office in the City of Laguna Hills, which is the proposed location for this effort. Kleinfelder demonstrated relevant experience executing public outreach programs for complex construction projects, such as the Interstate 215/Newport Road Interchange Improvement Project with the City of Menifee, and the Major Projects Program for the San Bernardino County Transportation Authority. The firm has also provided construction outreach services to OCTA. Kleinfelder developed and implemented the I-405 public outreach program and continues to provide outreach services for the Project. Additionally, the firm provided public outreach services for six OCTA Rail Capital Projects, which include the construction of the Metrolink parking structure at the Orange Transportation Center and the accessibility improvements at the Laguna Niguel/Mission Viejo Metrolink station. The firm demonstrated an understanding of Orange County and the related transportation issues with its discussion of the Long Range Transportation Plan, Measure M, and Master Plan of Arterial Highways, as well as the impacts of the Project. Kleinfelder proposed subcontractors in various areas, including diverse communities outreach, graphic design, translation support, specialty printing, and mobile application (app) support. Most of the proposed subcontractors are currently working with Kleinfelder on the existing I-405 public outreach program.

Arellano was established in 1994 and has 48 employees. The firm is headquartered in the City of Chino Hills with a satellite office in the City of Los Angeles. Arellano proposed multiple subcontractors to provide community outreach support, media services, specialty printing, and translation services. One of the subcontractors, TRC, is proposed to assist Arellano in leading the outreach program; however, both firms have not previously worked together. The past projects noted in the proposal highlight both Arellano's and TRC's public outreach experience with complex construction projects. Arellano's experience serving as the prime consultant includes the OC Bridges Grade Separation Program with OCTA, State Route 91 Project with Riverside County Transportation Commission (RCTC), and the 210 Freeway Public Information and Safety Program with the San Bernardino Associated Governments. TRC has provided public outreach services as a prime consultant for the Interstate 5 South County Improvements Project and the West County Connectors with OCTA. The firm was also a subcontractor for the Interstate 15 Express Lanes Design-Build Project with RCTC.

## Staffing and Project Organization

Both firms proposed project teams with construction outreach experience.

Kleinfelder proposed many of the same team members who are currently providing public outreach for the Project, such as the project manager and community liaisons. The proposed project manager has ten years of experience related to community outreach, public relations, stakeholder engagement, and campaign development, and has been with the firm for four years. The firm proposed seven community liaisons to ensure sufficient availability for this effort as an increase in outreach activities is anticipated as the Project progresses. Additionally, four of the seven community liaisons are proposed to be solely dedicated to this Project and will not be assigned to any other outreach projects. During the interview, the project team members discussed their roles and approach for continuing the I-405 public outreach program. All of the individuals present for the interview responded to the evaluation committee's questions. Their responses included examples of potential outreach tactics for this Project, as well as noted strategies used in past projects. Additionally, the project team's responses demonstrated an understanding of the demands of a design-build project and the efforts required to ensure that the information communicated is accurate and delivered in a timely manner. Furthermore, the firm emphasized that the project team is cross-trained and multi-disciplined to ensure all outreach needs are met.

Arellano proposed a project team that is led by staff from both Arellano and TRC. The proposed project manager has been with Arellano for one year and has over ten years of experience in construction relations, strategic communications, and stakeholder engagement. The proposed deputy project manager has been with TRC for nine years and has over 12 years of experience in construction outreach, message development, and community relations. The individual is proposed to direct the community liaisons, as well as to work in tandem with the project manager. However, the project manager and the deputy project manager have not previously worked together. The firm proposed seven community liaisons, which includes individuals from Arellano and TRC, to ensure availability throughout the Project. One of the community liaisons from TRC is proposed with 100 percent availability for this Project. During the interview, the project team discussed its roles and approach for continuing the outreach program. Although given opportunities to provide detailed responses, the team provided general responses to the evaluation committee's questions. In addition, responses were not provided by all team members present. While the deputy project manager's experience working on the West County Connectors project demonstrated an understanding of one segment of the project corridor and key



stakeholders, the project manager did not provide specific examples to demonstrate the same level of familiarity.

#### Work Plan

Kleinfelder presented a comprehensive work plan that addressed all the elements of the scope of work. The firm discussed its approach for continuing the I-405 public outreach program related to public engagement, diversity outreach, open houses and neighborhood meetings, one-on-one meetings with key stakeholders, construction safety awareness, and temporary construction easement wall notifications. The firm discussed various outreach activities such as rapid-response canvassing for targeted communities, assisting the design-build team with responding to and tracking project claims, updating the interactive map, and providing weekly construction alerts. Kleinfelder demonstrated an understanding of the project area and the key stakeholders affected by the Project. For example, the firm proposed conducting Speakers Bureau presentations with various community organizations, such as the Huntington Beach Chamber of Commerce, Irvine Asian American Senior Center, and Rossmoor Homeowners Association. The firm also demonstrated an understanding of upcoming project activities and outreach needs as the proposed level of effort is comparable to the OCTA project manager's projections related to the construction-phase outreach program. The firm provided examples of potential issues and proposed solutions, such as managing and coordinating multiple construction activities simultaneously, maintaining consistent and reliable response times, addressing last-minute schedule changes, and preparing for and responding to emergencies. Kleinfelder also proposed enhancements, such as leveraging voice-activated artificial intelligence by using digital assistants such as Alexa or Google, engaging Facebook community groups, developing mobile app push notifications, and utilizing Waze paid advertising to keep the Project communities informed of the progress.

Arellano addressed each element of the scope of work in its work plan. The firm provided a general overview of its approach for project management, engaging stakeholder groups, and developing collateral materials. The firm did not provide examples or elaborate on its strategies to demonstrate its understanding of the project area and key stakeholders to continue the I-405 public outreach program. For example, Arellano provided a broad list of stakeholder categories, but did not identify specific organizations or entities in the Project area. Arellano's proposed level of effort, which was 40 percent less than what Kleinfelder proposed, showed a limited understanding of the required comprehensive outreach needs for upcoming design-build project activities. The firm noted potential issues and proposed solutions related to construction fatigue, sound



walls, and access to businesses and schools. Arellano proposed enhancements such as using Geographic Information System technology, 3D animation, and a 24/7 project helpline, but did not go into detail as to how those strategies would be implemented to add value to the outreach program.

#### Cost and Price

Pricing scores were based on a formula which assigned the higher score to the firm with the lower weighted average hourly rate, and scored the other proposal's weighted average hourly rate based on its relation to the lower weighted average hourly rate. Kleinfelder proposed the lower weighted average hourly rate, as well as proposed more hours to continue the comprehensive I-405 public outreach program.

#### Procurement Summary

Based on the evaluation of written proposals, the firms' qualifications, and information obtained from the interviews, as well as pricing, the evaluation committee recommends the selection of Kleinfelder as the top-ranked firm to provide public outreach consulting services for the I-405 Improvement Project between SR-73 and I-605.

#### Fiscal Impact

The project was approved in OCTA's Fiscal Year 2019-20 Budget, Capital Programs Division, Account 0017-7519-FK101-N31 and Account 0037-7519-A9510-F37, and is funded through Measure M and state and federal funds.

#### **Summary**

Staff is recommending the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1571 between the Orange County Transportation Authority and Kleinfelder Construction Services, Inc., in the amount of \$3,326,544, for a four-year initial term, with an option term of up to 24 months, to provide public outreach consulting services for the Interstate 405 Improvement Project between State Route 73 and Interstate 605.

***Attachments***

- A. Review of Proposals, RFP 9-1571 Public Outreach for Interstate 405 Improvement Project
- B. Proposal Evaluation Criteria Matrix, RFP 9-1571 Public Outreach for Interstate 405 Improvement Project
- C. Contract History for the Past Two Years, RFP 9-1571 Public Outreach for Interstate 405 Improvement Project

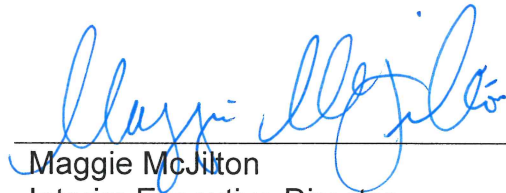
**Prepared by:**



---

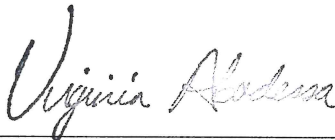
Chris Boucly  
Section Manager, Public Outreach  
External Affairs  
714-560-5326

**Approved by:**



---

Maggie McJilton  
Interim Executive Director,  
External Affairs  
714-560-5824



---

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