



April 6, 2020

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for Construction Management Support Services for the Interstate 5 Widening Project Between Alicia Parkway and El Toro Road

Overview

On November 11, 2019, the Orange County Transportation Authority Board of Directors authorized the release of a request for proposals to provide construction management support services for the Interstate 5 widening project between Alicia Parkway and El Toro Road. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the selection of Jacobs Project Management Co., as the firm to provide construction management support services for the Interstate 5 widening project between Alicia Parkway and El Toro Road.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1605 between the Orange County Transportation Authority and Jacobs Project Management Co., as the firm to provide construction management support services for the Interstate 5 widening project between Alicia Parkway and El Toro Road.

Discussion

The Orange County Transportation Authority (OCTA), in partnership with the California Department of Transportation (Caltrans), is implementing the Interstate 5 (I-5) widening project between State Route 73 (SR-73) and El Toro Road (Project). The Project is part of Projects C and D in the Measure M2 (M2) freeway program and is being advanced through the updated Next 10 Delivery Plan, which was approved by the OCTA Board of Directors (Board) in November 2019.

The Project will add one general purpose lane in each direction on I-5 between SR-73 and Alicia Parkway, extend the existing second high-occupancy vehicle (HOV) lane between Alicia Parkway and El Toro Road in each direction, re-establish existing auxiliary lanes, and construct new auxiliary lanes at various locations. In addition, the Project will reconstruct the Avery Parkway and La Paz Road interchanges, improve several on- and off-ramps, and convert existing and proposed HOV lanes to continuous access.

Construction is underway for Segments 1 and 2 of the Project with final design for Segment 3 nearing completion, with the following Project limits:

- Segment 1 extends between SR-73 and Oso Parkway
- Segment 2 extends between Oso Parkway and Alicia Parkway
- Segment 3 extends between Alicia Parkway and El Toro Road

Construction management (CM) services for Segments 1 and 2 were procured and awarded under separate contracts.

Segment 3, between Alicia Parkway and El Toro Road, is in the final design and right-of-way acquisition phase, and this procurement is for CM services for Segment 3 only. The Segment 3 construction contract will be advertised by Caltrans later this year.

Cooperative Agreement No. C-9-1600 between Caltrans and OCTA outlines the responsibilities of both agencies for the Project and was approved by the Board on November 11, 2019. As specified in the cooperative agreement, Caltrans will be the implementing agency responsible for advertisement, award, and administration of the construction contract. Caltrans will also provide the resident engineer and structures representative, environmental services, along with a limited number of field personnel. OCTA will retain a CM consultant firm to supplement Caltrans staff with structural, roadway, and electrical inspection, construction staking, office engineering, materials testing, surveying, and claims support services. OCTA's consultant will also provide a field office to house construction staff working on the Project. Through separate contracts, OCTA will lead the public outreach and freeway service patrol efforts.

Procurement Approach

This procurement was handled in accordance with 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, pursuant to state and federal laws, price is not an evaluation criterion. Evaluation of the proposals was conducted based on 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 Board-approved procurement policies.

On November 11, 2019, Request for Proposals (RFP) 9-1605 was issued electronically on CAMM NET. The RFP was advertised in a newspaper of general circulation on November 11 and November 18, 2019. A pre-proposal conference was held on November 20, 2019, with 35 attendees representing 25 firms. Two addenda were issued to make available the pre-proposal conference registration sheets and presentation materials, provide responses to questions received, and address administrative issues related to the RFP.

On December 17, 2019, five proposals were received. An evaluation committee consisting of staff from the Contracts Administration and Materials Management and Highway Programs departments, as well as external representatives from Caltrans and the City of Laguna Hills, met to review all submitted proposals. The proposals were evaluated based on the following Board-approved evaluation criteria and weights:

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

The evaluation criteria are consistent with the weighting developed for similar A&E procurements for CM services. In developing these weights, several factors were considered, giving the greatest importance to the staffing and project organization of the firm, as the qualifications of the project manager and other key personnel are very important to the successful and timely delivery 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 technical approach to the Project is critical to the successful performance of the Project. The final criterion, qualifications of the firm, evaluated the firm's experience in performing work of similar scope and size.

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 most qualified firms are listed below in alphabetical order:

Firms and Location

AECOM Technical Services, Inc. (AECOM)
Los Angeles, California

Jacobs Project Management Co. (Jacobs)
Irvine, California

On February 5, 2020, the evaluation committee interviewed the two short-listed firms. The interviews consisted of a presentation allowing each team to discuss its qualifications, highlight its proposal, and respond to evaluation committee questions. Each firm highlighted its staffing plan, work plan, and perceived Project issues. The firms were asked general questions regarding the team's approach to the requirements of the scope of work, management of the Project, coordination with various agencies, experiences with similar projects, and solutions in achieving the Project goals. After considering the presentations and responses to questions asked during the interviews, the evaluation committee adjusted the preliminary scores for both firms. However, Jacobs 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, the evaluation committee recommends Jacobs as the top-ranked firm to provide CM support services for Segment 3 of the Project. Jacobs submitted a comprehensive proposal that was responsive to the requirements of the RFP and presented a cohesive interview highlighting the firm's experience, staffing, and the technical approach to the work plan.

Qualifications of the Firm

Both short-listed firms are qualified to perform the required services. Each firm received positive references. The two short-listed firms demonstrated expertise in delivering and managing CM services. Both firms are established firms with relevant resources and experience providing construction inspection services for freeway and bridge widening projects.

Jacobs is a global corporation and was founded in 1947. The firm provides a full spectrum of CM services with a long record of services for large-scale transportation and freeway widening projects for OCTA and numerous other

public agencies. The firm has more than 300 offices worldwide with over 50,000 employees, including over 200 CM staff in southern California. Jacobs has provided a variety of CM support services on freeway and bridge widening projects, including 15 freeway widening projects in southern California, all involving bridges, 14 of which Jacobs served as the prime consultant.

Jacobs has demonstrated proficiency in providing CM support services such as freeway construction inspection, freeway/highway/street widening, bridge demolition and construction, roadway and structures inspection, traffic management, utility relocations, retaining walls, office engineering, scheduling, claims analysis, constructability review, Americans with Disabilities Act compliance, and Caltrans public agency coordination. Similar project experience includes CM services for OCTA's I-5 HOV widening project between Avenida Pico and Avenida Vista Hermosa (Segment 1), State Route 57 (SR-57) northbound widening project from Katella Avenue to Lincoln Avenue, and the Interstate 405 (I-405) improvement project. The proposed subconsultants to provide survey, inspection, office engineering, storm water pollution prevention plan, material testing, and scheduling all have experience working with Jacobs.

AECOM is a global firm that was founded in 1927 and has specialized in transportation-related construction projects for the last 20 years. The firm has over 75,000 employees, including over 150 CM staff in southern California. AECOM has provided CM support services in southern California for freeway widening, roadway improvement, interchange/overcrossing replacement, and bridge replacement projects, as a prime consultant and as part of an integrated team.

AECOM has demonstrated proficiency in providing CM support services for highway and bridge construction, roadway and structures inspection, electrical inspection, traffic management, retaining walls, office engineering, scheduling and claims, and Caltrans public agency coordination. Examples of relevant experience include CM support services for OCTA's State Route 91 (SR-91) widening between SR-57 and I-5 project, San Bernardino County Transportation Authority's (SBCTA) State Route 210 (SR-210) improvements project (Segments 9, 10, and 11), and current efforts for Caltrans' I-5 North Corridor Los Angeles County improvements (Segments 3 and 4), and I-5 South Corridor Los Angeles County improvements projects. The proposed subconsultants have experience working with AECOM and are proposed to provide construction inspection, field materials testing, and survey services.

Staffing and Project Organization

Both short-listed firms proposed qualified project managers, key personnel, and subconsultants with relevant CM experience in freeway and bridge widening, and roadway and structure inspection. Jacobs proposed a qualified project team with each key personnel demonstrating relevant and comprehensive CM experience with freeway and bridge widening projects. The team has demonstrated experience in bridge demolition and construction, roadway and structures inspections, and has extensive experience with Caltrans. Jacobs' proposed project manager (PM) has 25 years of CM experience on similar freeway/bridge construction projects, and performed the PM role for the OCTA/Caltrans SR-91 eastbound lane addition between State Route 241 and State Route 71, and as chief engineer for the OCTA/Caltrans State Route 22 HOV design-build project. The proposed PM also formerly worked for OCTA and was the PM for the OCTA/Caltrans I-5 Gateway widening project.

Jacobs' proposed senior roadway inspector has successfully delivered freeway and bridge widening, bridge replacement, and interchange realignment projects for over 30 years, primarily as a resident engineer with Caltrans, delivering eight projects in partnership with OCTA. Experience relevant to the Project includes serving as resident engineer on OCTA/Caltrans I-405/Interstate 605 West County Connectors west segment project, OCTA/Caltrans' I-5 Gateway widening project, and OCTA/Caltrans' SR-91 widening projects. The proposed PM and senior roadway inspector worked together on the I-5 Gateway widening project.

AECOM proposed a qualified project team with CM experience. The team's expertise includes a range of relevant CM services, including CM, roadway inspection, structural engineering and inspection, electrical inspection, and scheduling support, amongst other relevant expertise. AECOM's proposed PM spent 13 years as a resident engineer, senior resident engineer, and area construction manager with Caltrans. Relevant PM experience includes on-call claims and scheduling support contract with Caltrans, OCTA's Imperial Highway State Route 90 Segments B and C projects, and OCTA's Placentia Avenue grade separation project. The proposed PM also served as principal-in-charge of OCTA's SR-91 widening between SR-57 and I-5 project.

AECOM's proposed senior roadway inspector brings 39 years of experience, including six years working directly for Caltrans in the Construction Division. Relevant project experience includes serving as the resident engineer on OCTA's Orangethorpe Avenue railroad grade separation project, SBCTA's SR-210 construction segments 9 and 10, and I-10/Pepper Interchange projects.

Work Plan

Both short-listed firms met the requirements of the RFP, and each firm discussed its approach to the Project, identified risks, and discussed quality, budget, and schedule control methods.

Jacobs presented a project specific and comprehensive work plan. The work plan included a complete discussion of Project issues and challenges, such as construction staging and phasing, with realistic recommendations and proposed solutions demonstrating the firms' knowledge and experience. The proposal identified the top three challenges to risk management for the Project, including environmental issues, timely utility relocations for the Southern California Edison transmission lines and poles, and claims prevention. The work plan identified the top ten submittals based on the firm's CM experience that pose the greatest risk to the schedule and project performance. The approach to utilities, which was further emphasized at the interview, demonstrated awareness of this major project risk. The Jacobs team presented an interview demonstrating knowledge of its proposed approach to the scope of work, and the team provided detailed responses to interview questions.

AECOM presented a comprehensive work plan with a project specific approach across most plan elements. The team demonstrated an understanding of the overall Project issues and challenges. The work plan identified challenges and proposed solutions, such as bridge construction over the I-5, community access, and construction staging. The sequential project tasks matrix included in the work plan provided clear delineation of personnel responsibility by task throughout the Project. The work plan also included a specific daily approach to inspection during each project phase. The proposed PM was responsive to interview questions; however, there was limited participation from some of the other key personnel and responses to specific questions were general.

Fiscal Impact

The Project will be included in OCTA's Fiscal Year 2020-21 Budget and subsequent fiscal years' budget, Capital Programs Division, Account 0017-9085-FC106-06W, and will be funded with M2 funds.

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Summary

Staff requests Board of Directors' approval for the Chief Executive Officer to negotiate and execute Agreement No. C-9-1605 with Jacobs Project Management Co., as the firm to provide construction management support services for the Interstate 5 widening project between Alicia Parkway and El Toro Road.

Attachments

- A. Review of Proposals - RFP 9-1605 Construction Management Support Services for Interstate 5 Widening Project Between Alicia Parkway and El Toro Road
- B. Proposal Evaluation Criteria Matrix (Short-Listed), RFP 9-1605 Construction Management Support Services for Interstate 5 Widening Project Between Alicia Parkway and El Toro Road
- C. Contract History for the Past Two Years, RFP 9-1605 Construction Management Support Services for Interstate 5 Widening Project Between Alicia Parkway and El Toro Road

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