



**March 1, 2021**

**To:** Regional Planning and Highways Committee

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

**Subject:** Consultant Selection for the Development of Orange County Mobility Hubs Strategy

### **Overview**

Consultant services are required to develop the Orange County Mobility Hubs Strategy. Mobility hubs connect walking, biking, transit, and shared mobility options in convenient locations, resulting in an integrated suite of transportation services. This study will result in a strategy that identifies mobility hubs best practices, establishes criteria for siting mobility hubs in Orange County, and develops conceptual mobility hubs designs at priority locations recommended for further study. Proposals have been received and evaluated in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested for the selection of a firm to perform the required work.

### **Recommendations**

- A. Approve the selection of Steer Davies & Gleave, Inc., as the firm to develop the Orange County Mobility Hubs Strategy.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2646 between the Orange County Transportation Authority and Steer Davies & Gleave, Inc., in the amount of \$297,371, to develop the Orange County Mobility Hubs Strategy.

### **Discussion**

The objectives of this study are to 1) increase transit ridership, 2) reduce automobile dependence, 3) promote rideshare, 4) reduce air pollution, and 5) provide equity. Providing alternatives to single-occupancy vehicle (SOV) trips within regional activity centers enable mobility hubs to reduce vehicle dependency by improving access to transit, active transportation, and ridesharing. These mobility hubs can be situated at activity centers with

concentrations of employment, housing, shopping, and/or recreation. The improved multimodal access enhances the investments in transit service, transportation centers, park-and-ride facilities, and commuter/interregional rail stations. This in turn helps reduce congestion and vehicle-miles traveled while also improving air quality and equity within the transportation system.

The proposed study will develop an Orange County Mobility Hubs Strategy. The selected consultant will consider stakeholder input, best practices, lessons learned from peer agencies, and other relevant research to establish and apply criteria for siting and configuring effective mobility hubs in Orange County. This will include development of mobility hubs concepts that recommend services to improve travel options in high-priority locations identified through the study. The Orange County Mobility Hubs Strategy will also outline the next steps that are needed to support future considerations for implementation.

The Orange County Mobility Hubs Strategy will create a vision to guide future projects and help to establish performance expectations for those efforts. The concepts identified will require more detailed planning, engineering, coordination, and partnerships prior to implementation. Therefore, the Orange County Mobility Hubs Strategy is just the first step toward considering innovative strategies designed to better connect travelers to efficient mobility options serving Orange County's activity centers.

### ***Procurement Approach***

This procurement was handled in accordance with Orange County Transportation Authority (OCTA) Board of Directors (Board)-approved procedures for professional and technical services. Various factors are considered in an award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as project organization and staffing, prior experience with similar projects, work plan, as well as cost and price.

On November 9, 2020, Request for Proposals (RFP) 0-2646 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on November 9 and 16, 2020. A pre-proposal teleconference was on November 17, 2020, with seven attendees representing seven firms. Two addenda were issued to provide a copy of the pre-proposal registration sheet and to respond to questions related to the RFP.

On December 2, 2020, six proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Planning and Analysis, Local Programs, and Transit Service Planning departments met to review all proposals received. The proposals were evaluated based on the following evaluation criteria and weightings:

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

Several factors were considered in developing the criteria weightings. Qualifications of the firm was weighted at 25 percent as the firms had to demonstrate experience on similar projects, preferably involvement in the development of mobility hubs and/or related assignments. Staffing and project organization was weighted at 25 percent as the project team had to demonstrate expertise with project management and planning skills in the development of mobility hubs. Work plan was weighted highest at 30 percent to emphasize the importance of the firm demonstrating an effective approach to locating and designing mobility hubs, as well as any supporting services, amenities, and technologies that increase multimodal mobility. Cost and price was weighted at 20 percent to ensure OCTA receives competitive pricing for the proposed services.

On December 16, 2020, the evaluation committee reviewed all proposals received based on the evaluation criteria and short-listed the two most qualified firms. The two short-listed firms are as follows in alphabetical order:

Firm and Location

Alta Planning + Design, Inc. (Alta Planning)  
Portland, Oregon

Steer Davies & Gleave, Inc. (Steer)  
Los Angeles, California

On December 22, 2020, the evaluation committee interviewed the two short-listed firms. The interviews consisted of a presentation to demonstrate the firms' understanding of OCTA's requirements for this project. The firms' project managers and key team members had an opportunity to present qualifications and respond to the evaluation committee's questions. Questions were asked relative to the firms' experience performing similar services involving mobility hubs strategy projects, enhancements to the scope of work, and quality control procedures. Specifically, the firms were requested to discuss the work plan for completing the project within the anticipated 12-month project schedule. Additionally, the firms were asked to identify tasks where they may encounter delays and how the firm would propose to address those issues impacting the project timeline. Finally, firms were asked specific clarification questions related to each firm's proposal.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary rankings and made adjustments to individual scores. The overall ranking of the firms did not change as a result of the interviews.

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

#### **Qualifications of the Firm**

The short-listed firms are qualified and demonstrated experience providing related mobility hubs strategies locally and internationally.

Steer's main office is located in the City of Los Angeles and has provided mobility hubs planning services since 1989. The firm employs 15 employees in the Los Angeles office and 450 professionals globally. Steer has experience working on projects such as the Orange County Complete Streets Initiative for the Orange County Council of Governments, OCTA's Transit Supportive Design Guidelines, and Safe Routes to School Action Plan. Steer also demonstrated international experience on mobility hubs strategy and design. Recent work includes developing a mobility hubs strategy for South-East Scotland Transportation (SESTran), delivering a mobility hubs strategy and design for Vallecas in Spain, and was commissioned by the Calderdale Council in the United Kingdom to undertake demographic analysis to understand the potential for mobility hubs in Calderdale.

Alta Planning's project office is also located in the City of Los Angeles and was founded in 1996 with 172 employees throughout North America. The firm worked with Portland Bureau of Transportation to develop a kit of parts to guide mobility hubs planning and implementation and provided a study for the University of Utah that included location, land requirements, and programming needs for developing new campus mobility hubs. Alta Planning was also part of a team that provided land use and transportation technical analysis to identify potential corridors and operational plans linking multiple transit programs in Charlotte, North Carolina for the Charlotte Area Transportation System, and completed a transportation study that identified potential mobility hubs opportunities for Research Triangle Park in North Carolina.

#### **Staffing and Project Organization**

Both firms proposed experienced and knowledgeable project teams that met personnel requirements specified for this project.

Steer proposed a qualified team with experience related to mobility hubs strategies. The proposed project manager has more than eight years of experience and worked as an expert advisor for SEStran on the strategic study for the development of mobility hubs in the region. The project manager is also concluding the development of a Next Generation Transit Vision for the Sacramento Area Council of Governments. The goal of this effort is to understand how integrated transportation systems, including mobility hubs, could fit within the transit vision. The proposed principal-in-charge brings over 15 years of experience in the new mobility space and specializes in strategic design, stakeholder and organizational management, and business development and is currently working on Los Angeles Department of Transportation's mobility hubs project as well as Caltrain, San Francisco's mobility hubs project. During the interview, the project team provided comprehensive responses to the evaluation committee's questions.

Alta Planning proposed an experienced team. The proposed project manager has ten years of experience, as well as demonstrated knowledge and experience in shared mobility, micro-mobility, and transportation technology research. The project manager has worked on related projects including Salt Lake City North Temple, mobility hubs study design, Research Triangle mobility hubs design, and the City of Tucson mobility master plan. The principal-in-charge has 22 years of experience as a transportation planner and has worked on several related projects such as the Orange County Active Transportation Plan, Southern California Association of Government's Disadvantaged Communities Planning Initiative, and the Mountain View Comprehensive modal plan. The project team responded to all questions during the interview; however, labor-hour allocation to the project remained unclear.

### **Work Plan**

Steer presented a work plan that addressed all elements of the scope of work, its requirements, and presented a clear plan to accomplish necessary tasks and flexibility in scheduling based on specific tasks in the scope of work. The firm also discussed additional accommodations and enhancements for the proposed action plan. This included an OC Mobility Hubs Permit Playbook, a hands-on document that articulates key recommendations for mobility hubs permitting program, the approach to the recommended program, data rights consideration, foreseen site-specific pitfalls, and contingencies to work around them. The firm also proposed to have an additional enhancement activity focused on development of a business case as part of the firm's action plan for the mobility hubs strategy. The interview presentation demonstrated an understanding of the project requirements, and the firm discussed the enhancements and recommendations relevant to the mobility hubs strategy project.

Alta Planning's work plan demonstrated understanding of the project requirements. The firm discussed its general approach to completing the tasks that included enhancements to the scope of work, such as creating an interactive web-based data dashboard to communicate the results necessary for the mobility hubs strategy. The firm presented an optional task that included artificial intelligence (AI) to provide sidewalk and crosswalk inventory, and gap analysis of existing micro-mobility and pedestrian facilities based on AI derived database. Alta's proposal specified a budget that does not provide for multiple edits to the administrative draft. The scheduling was also broad and not clarified clearly during the interview.

#### **Cost and Price**

Pricing scores were based on a formula which assigned the highest score to the firm with the lowest firm-fixed price and scored the other proposals' firm-fixed price based on their relation to the lowest firm-fixed price. Steer's firm-fixed price was lower than the price proposed by Alta Planning and was also lower than the OCTA project manager's independent cost estimate. Therefore, Steer's proposed firm-fixed price is deemed fair and reasonable.

#### **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 Steer as the top-ranked firm to provide the Orange County mobility hubs strategy. Steer delivered a comprehensive proposal and an interview that was responsive to the requirements of the RFP.

#### **Fiscal Impact**

This project was approved in OCTA's Fiscal Year 2020-21 Budget, Planning Division, Account No.1531-7519-A4461-0YV, and is funded by a combination of Federal Surface Transportation Block Grants, as well as State Transportation Improvement Program funds.

#### **Summary**

Staff is recommending that the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2646 with Steer Davies & Gleave, Inc., in the amount of \$297,371, to develop the Orange County Mobility Hubs Strategy.

***Attachments***

- A. Review of Proposals, RFP 0-2646 Development of Orange County Mobility Hubs Strategy
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 0-2646 Development of Orange County Mobility Hubs Strategy
- C. Contract History for the Past Two Years, RFP 0-2646 Development of Orange County Mobility Hubs Strategy

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