



April 8, 2021

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Bus Restructuring Study Consultant Selection

Overview

The Orange County Transportation Authority requires the services of a firm to assist in the development of recommendations for restructuring the OC Bus fixed-route bus system. A competitive procurement has been conducted, and 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 for the selection of a firm to perform the required work.

Recommendations

- A. Approve the selection of Transportation Management and Design, Inc., as the firm to assist in restructuring the OC Bus fixed-route bus system.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2739 between the Orange County Transportation Authority and Transportation Management and Design, Inc., in the amount of \$549,914, to assist in the development of recommendations for restructuring the OC Bus fixed-route bus system.

Discussion

The Orange County Transportation Authority (OCTA) last completed a comprehensive bus restructuring study of OC Bus service in 2012. The "Transit System Study" was the basis for changes to OC Bus service between 2016 and 2018. In general, these changes reallocated service from lower productivity routes and areas to core service areas where these resources could yield additional ridership and improved productivity. The coronavirus (COVID-19) pandemic has affected transit ridership significantly in Orange County and throughout the nation. As part of the continuous efforts to review the OC Bus fixed-route system, OCTA is looking to restructure the OC Bus system based on recent changes in demand, travel patterns, and funding.

OCTA requires a consultant team with a full range of professional and technical skills to fulfill and effectively integrate the tasks outlined in the scope of work. The selected consultant team shall have a demonstrated understanding of Orange County and the principles and best practices for restructuring bus service. The project will be broken into three distinct phases. Phase 1 consists of extensive research of prior studies and the current and projected transit and transportation landscape. Phase 2 entails the development and refinement of a service plan with recommended changes to the OC Bus system. Finally, Phase 3 would develop and implement the recommended service plan. The base contract will include phases 1 and 2. OCTA will have the option to exercise Phase 3, depending on the need for consultant services. A comprehensive public outreach component will be implemented to solicit public input throughout each phase of the study.

Procurement Approach

This procurement was handled in accordance with OCTA Board of Directors-approved procedures for professional and technical services. In addition to cost, many other 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 January 11, 2021, Request for Proposals (RFP) 0-2739 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on January 12 and 18, 2021. A pre-proposal conference was held on January 18, 2021, with attendees representing six firms. Three addenda were issued, including a copy of the pre-proposal registration sheet, the pre-proposal conference presentation and responses to questions related to the RFP.

On February 8, 2021, three proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Transit Service Planning, Marketing and Customer Engagement, Schedule and Bus Operations Support, and Public Outreach departments, as well as an external representative from the Los Angeles County Metropolitan Transportation Authority (LA Metro) met to review all proposals received. The proposals were evaluated based on the following evaluation criteria and weightings:

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

Several factors were considered in developing the criteria weightings. Qualifications of the firm was weighted at 25 percent to emphasize the importance of firms demonstrating relevant experience restructuring bus route systems for transportation agencies. Staffing and project organization was weighted highest at 30 percent to ensure the proposed project team demonstrated the required skills and expertise in bus restructuring, because the staff will be recommending various approaches to restructuring the OC Bus system. Work plan was weighted at 25 percent as the firm's final product needed to demonstrate a comprehensive approach to developing recommendations for improvement of the OC Bus system. Cost and price was weighted at 20 percent to ensure OCTA receives competitive pricing for this project.

On February 23, 2021, the evaluation committee reviewed all proposals received based on the evaluation criteria and interviewed all proposing firms. The three proposing firms are listed below in alphabetical order:

Firm and Location

Jarrett Walker & Associates, LLC (JWA)
Portland, Oregon

Nelson/Nygaard Consulting Associates (Nelson/Nygaard)
San Francisco, California

Transportation Management & Design, Inc. (TMD)
Carlsbad, California

On March 2, 2021, the evaluation committee interviewed all three firms. The interviews consisted of a presentation to demonstrate the firms' understanding of OCTA's requirements for this project. Specifically, the firms were requested to describe their approach to restructuring the OC Bus fixed-route system.

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, incorporating public feedback into the redesign, existing/growing

ridership, and the potential long-term impacts on transit ridership. 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 adjusted individual scores. The overall ranking of the firms did not change as a result of the interviews.

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

Qualifications of the Firm

TMD was founded in 1988 and has 20 employees. The firm is located in the City of Carlsbad. TMD demonstrated relevant experience as shown in the completed San Diego Metropolitan Transit System (MTS) Transit Optimization Plan for the San Diego MTS, the Transit System Study (TSS) for OCTA, as well as the ongoing NextGen Bus Study for LA Metro, all of which are projects similar in complexity to the services required for this project and for agencies that are either comparable in size or larger than OCTA. TMD proposed three subcontractors that have experience working on similar projects and which will manage various tasks of the project. Cambridge Systematics will lead development of the survey and trip planner comparison tool. PBA Transit Planning will assist with the data elements required as input for the project's visualization tools. Stantec will analyze current OC ACCESS and OC Flex services data, as well as the development of alternative service concepts.

JWA was founded in 2011 and has 14 employees. The firm's relevant experience includes the review and redesign of the Valley Transportation Authority bus network in Santa Clara County and the Dublin Network Redesign for the National Transport Authority of Ireland. Both projects include analyzing and redesigning the existing public transportation network, engaging the public, and working with representatives of the local government authorities to strategize and complete the system redesign.

Nelson/Nygaard was established in 1987 and has 114 employees. Relevant experience includes the Foothill Transit Comprehensive Operational Analysis for Foothill Transit, the Torrance Transit Comprehensive Operational Analysis for the Torrance Transit System, and OCTA's OC Transit Vision, all of which included a system analysis component. The firm proposed three subcontractors with experience in similar transportation projects. The subconsultants Fehr and

Peers, Arellano Associates, and CSched have partnered with Nelson/Nygaard for over five years on multiple projects. Similar projects include the LA Metro Bus Rapid Transit Vision and Principles Study and the Torrance Transit Comprehensive Operational Analysis for the City of Torrance.

Staffing and Project Organization

TMD proposed qualified staff with experience in local and regional transit planning, market analysis, and redesign/restructuring transit systems. The proposed project manager has 15 years of transportation industry experience and has led similar projects, including OCTA's TSS project and LA Metro's NextGen Bus Study. The proposed project team has relevant experience with comprehensive transit studies such as the ongoing NextGen Bus Study for LA Metro and OCTA's TSS Project. These are significant projects as they include elements of analyzing comprehensive data, fixed-route bus systems, and projecting future travel demands. Additionally, TMD's proposed key personnel proposed over 40 percent availability on average to perform work on this project with the project manager indicating 70 percent availability. All of the individuals present for the interview responded to the evaluation committee's questions. The project team's responses included examples of multiple methods for engaging the community, an assessment of the COVID-19 pandemic impacts on transit demand, and their vision for the future of ridership in Orange County.

JWA proposed a project manager with over ten years of experience in transportation. The project manager and the majority of the proposed project team have previously worked together on the Long-Range Regional Transit Plan for Tucson, Arizona, and the Dublin Network Redesign. Both projects are relevant as they are complete restructures of existing bus/transportation systems. Although all of the key personnel were present during the interview, the majority of responses were provided by the principal for the project with minimal participation from the proposed project manager or the rest of the project team in attendance.

Nelson/Nygaard proposed a project manager with 15 years of experience in transportation. The proposed project manager has managed the Torrance Transit Comprehensive Operational Analysis for the City of Torrance and is currently working on the CityLink Comprehensive Operational Analysis for the Greater Peoria Mass Transit District in Peoria, Illinois. Both projects include a comprehensive assessment, extensive community outreach, service improvements, and recommendations for future system planning. During the interview, the proposed project team provided general responses to questions.

Work Plan

TMD presented a comprehensive work plan that addressed all the elements of the scope of work. The firm discussed a balanced approach to outreach and communication to the public as required by the scope of work. TMD provided a clear approach to completing the work plan, as well as extensive technical details that addressed the requirements in the scope of work, such as how they will gather and utilize transit/transportation data and their methods for conducting outreach activities throughout the different phases of the project. The firm also proposed to create an external public web portal to receive public feedback with the ability for OCTA to download the data directly from a website.

JWA's work plan addressed the various elements of the scope of work and included an explanation for each step. The firm's work plan focused heavily on customer feedback and lacked details in addressing the technical requirements of the project. The firm's proposal and interview further demonstrated its approach to engaging the community to gather data. The firm provided limited information on its technical approach including collection and analysis of data. The firm's work plan was heavily focused on performing public outreach during various phases of the project, which could potentially impact the project schedule to exceed the proposed project completion date.

Nelson/Nygaard presented a work plan that addressed all of the key elements of the scope of work. The firm described the level of effort for each task. Nelson/Nygaard also proposed to use an online web portal as their primary method to gather public feedback as required for this project. However, during the interview, the firm was not able to elaborate on the features of the public web portal, as the subconsultant responsible for the design was not in attendance.

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. Although TMD's total firm-fixed price was not the lowest, it was competitive among the prices received from the other two firms and was lower than the OCTA estimated budget. Therefore, TMD's proposed firm-fixed price was deemed fair and reasonable.

Procurement Summary

Based on the evaluation of written proposals, the firms' qualifications, information obtained from the interviews, as well as pricing, the evaluation committee recommends the selection of TMD as the top-ranked firm to assist in the restructuring of the OC Bus fixed-route system. TMD delivered a comprehensive proposal and interview that was responsive to the requirements of the RFP.

Fiscal Impact

Funding for this project is approved in OCTA's Fiscal Year 2020-21 Budget, Planning Division, Account No. 1539-7519-D0016-1LM, and is funded with local funds.

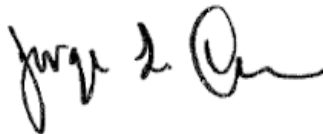
Summary

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2739 with Transportation Management and Design, Inc., in the amount of \$549,914, to assist in the development of recommendations to restructure the OC Bus fixed-route bus system.

Attachments

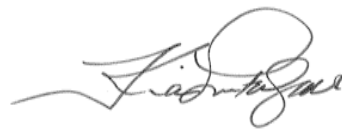
- A. Review of Proposals, RFP 0-2739 Restructuring the OC Bus Fixed-Route System
- B. Proposal Evaluation Criteria Matrix, RFP 0-2739 Restructuring the OC Bus Fixed-Route System
- C. Contract History for the Past Two Years, RFP 0-2739 Restructuring the OC Bus Fixed-Route System

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