



July 8, 2024

To: Members of the Board of Directors

From: Darrell E. Johnson, Chief Executive Officer

Subject: Approval to Release Request for Proposals for Construction Management Support Services for the State Route 57 Improvement Project Between Orangewood Avenue and Katella Avenue

A handwritten signature in blue ink, appearing to read "Darrell Johnson", is written over the "From:" line of the memo.

Overview

The Orange County Transportation Authority has developed a request for proposals to initiate a competitive procurement process to retain a consultant to provide construction management support services for the State Route 57 Improvement Project between Orangewood Avenue and Katella Avenue.

Recommendations

- A. Approve the proposed evaluation criteria and weightings for Request for Proposals 4-2241 for the selection of a consultant to provide construction management support services for the State Route 57 Improvement Project between Orangewood Avenue and Katella Avenue.
- B. Approve the release of Request for Proposals 4-2241 to provide construction management support services for the State Route 57 Improvement Project between Orangewood Avenue and Katella Avenue.
- C. Authorize the use of up to \$9.125 million in Measure M2 Freeway funds for construction management support services for the State Route 57 Improvement Project between Orangewood Avenue and Katella Avenue.

Discussion

The Orange County Transportation Authority (OCTA), in partnership with the California Department of Transportation (Caltrans), is implementing the State Route 57 (SR-57) Improvement Project between Orangewood Avenue and Katella Avenue (Project). The Project is part of Project G in the Measure M2 freeway program and is being advanced through the updated

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Next 10 Delivery Plan approved by the OCTA Board of Directors (Board) in November 2023.

The Project will add one general purpose lane in the northbound direction on SR-57 between Orangewood Avenue and Katella Avenue, re-establish the auxiliary lane northbound between Orangewood Avenue and Katella Avenue, and improve the existing on- and off-ramps at Orangewood Avenue and the off-ramp at Katella Avenue.

Final design for the Project is nearing completion with advertisement for construction bids targeted for mid-2025. OCTA staff proposes to use Caltrans for the advertising, award, and administration of the construction contract. OCTA will provide consultant field staff for construction inspection, office engineer, scheduling, claims support, materials testing, environmental and paleontology monitoring, the resident engineer's office, and vehicles for field inspectors. As the implementing agency for the construction phase, Caltrans will provide the senior resident engineer, structures representative, surveying, and other field personnel, along with construction administrative support. A construction cooperative agreement with Caltrans will be executed prior to the Project moving into the construction phase. This approach has been used successfully on the previously constructed SR-57 northbound Improvement Projects and is currently being used for the Interstate 5 Improvement Projects in south Orange County between State Route 73 and El Toro Road, as well as the State Route 55 Improvement Project between Interstate 405 and Interstate 5.

This is project G in the M2 freeway program, and the use of \$9.125 million in M2 funds is consistent with the Board-approved Capital Programming Policies to support Next 10 Delivery Plan projects.

Procurement Approach

OCTA's Board-approved procurement policies and procedures require the 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 evaluation criteria and weightings, which will be used to evaluate proposals received in response to the RFP. The recommended evaluation criteria and weightings are as follows:

- Qualifications of the Firm 20 percent
- Staffing and Project Organization 40 percent
- Work Plan 40 percent

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The evaluation criteria and weightings are consistent with criteria developed for similar architectural and engineering (A&E) procurements. In developing the criteria and weightings, several factors were considered. The firm's qualifications and experience in performing relevant work of similar scope and size and complexity are important to the success of the Project. Staff proposes to assign a high level of importance to staffing and project organization, as the qualifications of the project manager and other key task leaders are critical to the timely delivery and successful performance of the Project. Likewise, staff proposes to assign an equal level of importance to the work plan as the technical approach and understanding of the Project is critical to the successful performance of the Project. As this is an A&E procurement, price is not an evaluation criterion pursuant to state and federal laws.

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

Fiscal Impact

Funding for this Project is included in OCTA's Fiscal Year 2024-25 Budget and subsequent fiscal years' budgets, Capital Programs Division, Account No. 0017-9085-FG104-06W, and will be funded with local M2 funds. Staff is seeking Board approval for \$9.125 million in Measure M2 Freeway funds and will return to the Board at a later date with the cooperative agreement and remaining funding needed for Caltrans construction capital and construction management support services.

Summary

Board of Directors' approval is requested to release Request for Proposals 4-2241 for construction management support services for the State Route 57 Improvement Project between Oranewood Avenue and Katella Avenue, as well as authorize the use of up to \$9.125 million in Measure M2 Freeway funds, and approve the proposed evaluation criteria and weightings.

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Attachment

- A. Draft Request for Proposals (RFP) 4-2241, Construction Management Support Services for the State Route 57 Northbound Improvement Project between Orangewood Avenue and Katella Avenue

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