



November 13, 2025

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for Construction Management Services for the Inland Slope Rehabilitation Phase II Project

Overview

The Orange County Transportation Authority Board of Directors approved the construction of the Inland Slope Rehabilitation Phase II Project as part of the Orange County Transportation Authority Fiscal Year 2025-26 Budget. On November 18, 2024, a request for proposals was released for construction management services. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the recommended selection of Fulcrum Consultants, Inc. as the firm to provide construction management services for the Inland Slope Rehabilitation Phase II Project.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2582 between the Orange County Transportation Authority and Fulcrum Consultants, Inc., in the amount of \$624,802, to provide construction management services for the Inland Slope Rehabilitation Phase II Project.

Discussion

The Orange County Transportation Authority (OCTA) owns the Orange Subdivision railroad right-of-way (ROW) between the Fullerton Junction and the San Diego County Line. This rail corridor is part of the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor that hosts both intercity and commuter passenger and freight rail service. The LOSSAN Rail Corridor is of state and national importance and is also designated as a national defense

connector line as part of the Strategic Rail Corridor Network by the Department of Defense.

OCTA has secured state SB 1 (Chapter 5, Statutes of 2017) – Local Partnership Program Formula (LPP) funds, matched with local Measure M2 (M2) funds to repair erosion and perform preventative maintenance to avoid slope failures on the railroad right-of-way. Field investigations conducted jointly with the Southern California Regional Rail Authority (SCRRA) identified six sites in the cities of Laguna Niguel, Lake Forest, and Mission Viejo requiring stabilization, as shown in Attachment A. These locations consist of steep embankments, ranging from 200 to 700 linear feet in length, that if left unaddressed, could undermine the track bed and/or deposit debris onto the tracks, potentially disrupting rail operations.

A geotechnical evaluation was completed in July 2022 with site-specific mitigation recommendations, including grading, shotcrete lining, and open channel culverts. Final design plans and specifications for the Inland Slope Rehabilitation Phase II Project (Project) were completed in April 2025 and are now ready to be implemented. OCTA will lead the construction of all six site locations. Construction is anticipated to begin in January 2026 and completed within six months. Work will be coordinated closely with SCRRA to minimize rail service impacts, especially during the rainy season when slope stability risks increase.

Construction management (CM) services are necessary to oversee the construction contractor and perform oversight and monitoring services, such as health and safety compliance observations, management of the contractor's budget and schedule, claims avoidance and change order analysis, inspections, quality assurance testing, labor compliance, and other construction required tasks to keep the Project on schedule and within budget.

Procurement Approach

This procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for architectural and engineering (A&E) services that conform to both state and federal 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, price is not an evaluation criterion pursuant to state and federal laws. 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 18, 2024, Request for Proposals (RFP) 4-2582 was electronically issued on CAMM NET. The Project was advertised on November 15 and November 22, 2024, in a newspaper of general circulation. A pre-proposal conference was held on November 25, 2024, with six attendees representing ten firms. Three addenda were issued to make available the pre-proposal conference registration sheets, provide responses to questions received, and handle administrative issues related to the RFP.

On December 20, 2024, seven proposals were received. An evaluation committee consisting of members from OCTA's Capital Project Delivery, Facilities Engineering, and Regional Rail Operations departments met to review all submitted proposals. The proposals were evaluated utilizing the following evaluation criteria and weightings:

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

In developing the criteria and weightings, several factors were considered. The firm's qualifications and experience in performing relevant work of similar scope, size, and complexity are important to the success of the Project. The staffing and project organization criteria was assigned a weighting of 40 percent as the qualifications of the construction manager and other key task leaders are critical to understanding project requirements and to the timely delivery and successful performance of the work. Similarly, an equal level of importance was assigned to the work plan, as the technical approach to the Project is critical to the successful performance of the Project.

The evaluation committee reviewed all seven 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:

Firm and Location

Fulcrum Consultants, Inc. (Fulcrum)
Headquarters: Irvine, California
Project Office: Irvine, California

SYRUSA Engineering, Inc. (SYRUSA)
Headquarters: Brea, California
Project Office: Brea, California

On February 11, 2025, the evaluation committee interviewed the two short-listed firms. The interviews consisted of a presentation allowing each team to present their qualifications, highlight their proposal, and respond to evaluation committee questions. Each firm also discussed their staffing plan, work plan, and perceived project challenges. Each firm was asked general questions related to qualifications, relevant experience, project organization, and approach to the work plan, as well as questions specific to their proposal regarding their team's approach to the requirements of the scope of work, management of the Project and the proposed solutions towards achieving project goals.

Based on the evaluation of written proposals and information obtained during the interviews and that the Project's estimated budget was below the threshold requiring Board approval, the evaluation committee recommended to the Contracts Administration and Materials Management (CAMP) Department the selection of Fulcrum as the top-ranked firm to provide CM services for the Project. Fulcrum received the highest ranking due to its experience with projects of similar scope and scale, familiarity with the project requirements, comprehensive understanding of the project objectives and constraints, presentation of relevant technical solutions, and overall approach in performing the required CM services. The firm presented a qualified team that met the requirements of the RFP and presented a comprehensive work plan addressing key issues that are critical to the success of the Project. CAMP management approved the selection of the recommended firm on February 19, 2025, and a cost proposal was requested.

OCTA's original budgeted amount for this procurement was \$414,893, but it did not assume pre- and post-construction activities. After reviewing the recommended firm's cost proposal and re-evaluation of the hours needed to fulfill the scope of work, Fulcrum's cost proposal, in the amount of \$624,802, is considered by staff to be fair and reasonable. As the negotiated amount exceeds the \$500,000 threshold requiring Board approval, staff is requesting Board approval of the recommended selection of Fulcrum.

The following is a summary of the proposal evaluation results.

Qualifications of Firm

The two short-listed firms are well established with recent and relevant experience and are qualified to perform CM services for the Project.

Fulcrum specializes in project, program, and agency CM and project controls services, and capital program advisory and consulting services. The firm has provided these services to several transportation clients in California, including the Los Angeles County Metropolitan Transportation Authority (LA Metro), California Department of Transportation (Caltrans), and OCTA. Fulcrum's corporate headquarters is in the City of Irvine. The firm's prior experience with OCTA includes work on the Interstate 405 (I-405) Improvement Project and I-405 Sepulveda Pass with LA Metro. The subconsultants have experience working with Fulcrum on past projects of similar size and scope. Positive references were received for the firm.

SYURSA specializes in CM, structure construction inspection, and resident engineering services for transportation infrastructure projects. The firm is based in the City of Brea. The firm has provided services to several transportation clients in California, including the San Bernadino County Transportation Authority (SBCTA), Caltrans, and Orange County Public Works. Relevant experience includes the CM services for SBCTA on the I-10 Corridor Express Lanes Design-Build and Caltrans' Interstate 5 Box Culvert Replacement and Embankment Reconstruction. Additionally, experience with OCTA includes office engineering and construction inspection services on the Laguna Niguel to San Juan Capistrano Passing Siding Project. The subconsultants have experience working with SYRUSA on past projects. Positive references were received for the firm.

Staffing and Project Organization

Both firms proposed experienced construction managers, key personnel, and subconsultants with relevant CM experience in slope stabilization projects.

Fulcrum proposed a qualified project team with relevant experience and understanding of the project issues, risks, and challenges. The team, including subconsultants, are experienced in the various disciplines required for the Project and have relevant experience with railroad projects. The proposed construction manager has 15 years of CM experience that includes recent experience working with OCTA on the I-405 Improvement Project. The proposed resident engineer (RE) has 33 years of CM experience and 25 years of resident engineering experience. The field inspector has over 30 years of CM experience and served as the field inspector on OCTA's Slope Stabilization Phase I Project while with a different firm. The overall team proposed by Fulcrum includes subconsultants that provide a depth of resources such as office engineering/document control, field inspection, safety consulting, soils and materials testing, and quality assurance surveying to address the special needs of the Project.

SYRUSA proposed an experienced project team with each key personnel demonstrating relevant CM experience. The team is proficient in the various disciplines required for the Project. SYRUSA's proposed construction manager has over 27 years of CM experience. Experience includes management of complex infrastructure projects while serving at Caltrans in various roles. The RE has 33 years of experience on highway and bridge construction projects. The field inspectors were not identified as key personnel, as required by the scope of work, and their availability for this Project was unclear. The proposed team includes qualified and experienced subconsultants for electrical inspection, quality assurance, project controls engineer, safety oversight and material testing.

Work Plan

Both short-listed firms met the requirements of the RFP, and each firm adequately discussed its approach to the Project.

Fulcrum presented a comprehensive and viable work plan that demonstrated an understanding of the project requirements and identified project challenges, mitigations, and innovation. The detailed work plan considered long lead items for the entire scope of the Project. The work plan discussed utility coordination, public outreach and impacts, identified conflicts, and technically sound list of process controls for each phase of the Project. The work plan provided a detailed narrative as to how the CM services would be provided based on lessons learned from previous similar successful projects, while maintaining the project schedule. An area of innovation identified in the work plan was to construct the access road at the bottom of the slope instead of the top of the slope to eliminate the need for a retaining wall.

The overall approach described in Fulcrum's work plan highlighted detailed discussions of challenges and mitigations for each area, including access, utilities, public impacts, and constructability. The information presented during the interview demonstrated the firm's knowledge of the scope of work, objectives, and risks associated with the Project. The team provided project-specific responses to all interview questions.

SYRUSA provided a detailed work plan that demonstrated an understanding of the project scope of work, issues, and risks. SYRUSA's overall approach to project execution described in the work plan and presented during the interview identified potential risks accompanied by mitigation plans, detailed approach to complete the tasks, and discussed project challenges. SYRUSA listed considerations for best results on shotcrete, grading, enviro-block, and inlet erosion repair, noting train vibrations. The CM plan was innovative using aerial

images, identifying nearest arterial access points, and summarizing elements of work and adjacent property uses.

SYRUSA's overall approach to project execution described in the work plan and presented during the interview identified potential risks accompanied by mitigation plans, detailed approach to complete the tasks, and discussed project challenges. The interview confirmed the technical knowledge and expertise of SYRUSA. The firm presented an interview with detailed responses from the project manager to the evaluation committee's questions.

Procurement Summary

Based on the evaluation of the written proposals, team qualifications, and information obtained during the interviews, the evaluation committee recommended the selection of Fulcrum as the top-ranked firm to provide CM services for the Project. Staff negotiated a final cost proposal, in the amount of \$624,802, and are requesting authorization to execute the final agreement.

Fiscal Impact

The Project is included in OCTA's Fiscal Year 2025-26 Budget, Capital Programs Division, Account No. 0018-9085-C5054-TYR, and is funded by state grant SB 1 LPP and local M2 funds.

Summary

Staff requests Board of Directors' authorization for the Chief Executive Officer to execute Agreement No. C-4-2582 with Fulcrum Consultants, Inc., in the amount of \$624,802, to provide construction management services for the Inland Slope Rehabilitation Phase II Project.

Attachments

- A. Project Location Map
- B. Review of Proposals – RFP 4-2582 Construction Management Services for Inland Slope Rehabilitation Phase II Project
- C. Proposal Evaluation Criteria Matrix (Short-Listed Firms) – RFP 4-2582 Construction Management Services for Inland Slope Rehabilitation Phase II Project
- D. Contract History for the Past Two Years – RFP 4-2582 Construction Management Services for Inland Slope Rehabilitation Phase II Project

Prepared by:



Jason Lee
Program Manager, Capital Project
Delivery
(714) 560-5833

Approved by:



James G. Beil, P.E.
Executive Director, Capital Programs
(714) 560-5646



Pia Veessen
Director, Contracts Administration and
Materials Management
(714) 560-5619