



March 20, 2025

To: Legislative and Communications Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Agreement for Public Outreach Services for the Interstate 5 Improvement Project from Interstate 405 to State Route 55

Overview

On October 14, 2024, the Orange County Transportation Authority released a request for proposals for public outreach consulting services during the pre-construction and construction phases of the Interstate 5 Improvement Project from Interstate 405 to State Route 55. Board of Directors' approval is requested to execute an agreement for these services.

Recommendations

- A. Approve the selection of Kleinfelder Construction Services, Inc., as the firm to provide public outreach consultant services for the Interstate 5 Improvement Project from Interstate 405 to State Route 55.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2488 between the Orange County Transportation Authority and Kleinfelder Construction Services, Inc., in the amount of \$1,199,260, for a six-year initial term with an option term of up to 24 months, to provide public outreach consultant services for the Interstate 5 Improvement Project from Interstate 405 to State Route 55.

Discussion

Interstate 5 (I-5) improvements between Interstate 405 (I-405) and State Route 55 (SR-55) (Project) are part of Project B in the Measure M2 freeway program, also known as Measure M2. The Project is Project B in the Measure M2 (M2) freeway program and is being advanced through the updated Next 10 Delivery Plan adopted by the OCTA Board of Directors (Board) in November 2024.

I-5 is a major north-south corridor connecting Orange County with Los Angeles and San Diego counties. The Project area includes the cities of Irvine and Tustin and extends approximately nine miles. The \$716 million Project is funded through a combination of federal, state, and local funds.

The Project will be constructed in two segments:

- Segment 1 extends from I-405 to Yale Avenue
- Segment 2 extends from Yale Avenue to SR-55

Both Segments 1 and 2 are scheduled to begin construction in 2026.

The Project corridor consists of residential, commercial, and industrial land uses adjacent to the freeway. It connects with the State Route 133 and the State Route 261 toll road facilities and crosses Orange County Flood Control channels and a rail line. The annual average daily traffic through the Project corridor is approximately 275,600 vehicles, and the corridor currently experiences congestion and traffic delays.

The Project includes improvements to both directions of I-5, affecting interchanges connectors, ramps, walls, drainage systems, and utilities. The Project will add a new regular lane in each direction from I-405 to SR-55, restripe the limited-access high-occupancy vehicle lane to continuous access in both directions, and add merge lanes in the southbound direction. Additionally, six bridges will be improved, and ramps will be modified at several interchanges to bring them up to current design standards and make them safer for pedestrians, bicyclists, and motorists. The Project will also construct several sound walls and retaining walls.

Extensive outreach efforts are needed to communicate major activities to residents, business owners, large employers, motorists, first responders, active transportation stakeholders, and other key constituents such as local agencies and the trucking and tourism industries. Major activities include bridge and wall demolition and reconstruction, pile driving, ramp realignments, and utility work, which will require long- and short-term freeway, ramp, and local street closures.

OCTA, with consultant support, will implement a comprehensive public outreach program that will engage all stakeholders, including hard-to-reach and underrepresented communities, using a variety of methods and tools such as:

- Conducting one-on-one meetings with city representatives, key stakeholders, community-based organizations, and members of the business and faith-based communities
- Providing city council and speakers bureau presentations
- Developing and sending email newsletters and text notifications
- Hosting in-person and virtual neighborhood meetings
- Providing an interactive map of closures and detours
- Developing content for digital communications
- Canvassing flyers and other printed collateral along the Project corridor
- Researching, resolving, and tracking constituent inquiries

In addition, the consultant will assist with coordinating pre- and post-construction surveys and facilitate implementation of temporary construction easements.

Procurement Approach

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

On October 14, 2024, the Board authorized the release of Request for Proposals (RFP) 4-2488, which was issued electronically on CAMM NET. The Project was advertised in a newspaper of general circulation on October 14 and October 21, 2024. A pre-proposal conference was held on October 22, 2024, with nine attendees representing seven firms. Two addenda were issued to provide the pre-proposal conference registration sheet, presentation, and responses to written questions related to the RFP.

On November 12, 2024, four proposals were received. An evaluation committee composed of OCTA staff from Contracts Administration and Materials Management, Public Outreach, and Capital Project Delivery departments, along with an external representative from the California Department of Transportation, met to review all the proposals received.

The proposals were evaluated based on the following Board-approved evaluation criteria and weightings:

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

Several factors were considered in developing the evaluation criteria weightings. The qualifications of the firm were weighted at 20 percent as the consulting firm had to demonstrate public outreach experience on complex transportation projects during pre-construction and construction phases. Staffing and project organization was weighted at 25 percent as the proposing firm had to demonstrate an experienced, well-rounded team consisting of senior and junior level staff having adequate availability, as well as relevant experience performing outreach services on large construction projects. Work plan was weighted at 30 percent as the plan had to consider the unique needs of a corridor composed of residential, commercial, and industrial businesses that also serves motorists commuting from Orange County to and from Los Angeles and San Diego counties. Additionally, the proposed work plan had to demonstrate an understanding of the Project scope and challenges, as well as the level of effort required. Cost and price were weighted at 25 percent to ensure that OCTA receives value for the services provided.

The evaluation committee utilized a best-value selection process for this RFP. The best-value determination is based on a 100-point scale with 75 points based on the evaluation of the technical proposal and the remaining 25 points based on the evaluation of the price proposal. The RFP required proposing firms to submit a separate price proposal in a sealed package. In order to focus on the technical aspects of the proposals, the evaluation committee first evaluated the written proposals on technical merit based on the weighted criteria for qualifications of the firm, staffing and project organization, and work plan, which represented a maximum of 75 points of the total proposal score. After the interviews, the technical scores of the short-listed firms were finalized, the sealed price proposals of only the short-listed firms were then opened and shared with the evaluation committee, and the cost and price score were factored into the overall score for a maximum of 100 points.

On December 17, 2024, the evaluation committee reviewed the four proposals based on the Board-approved evaluation criteria and short-listed the two most qualified firms listed below in alphabetical order:

Firm and Location

Costin Public Outreach Group, Inc. (CPOG)
Headquarters: Huntington Beach, California
Project Office: Huntington Beach, California
Kleinfelder Construction Services, Inc. (Kleinfelder)
Headquarters: San Diego, California
Project Office: Laguna Hills, California

On January 14, 2025, the evaluation committee conducted interviews with the two short-listed firms. The interviews consisted of a presentation by each firm to demonstrate the firms' understanding of OCTA's requirements. The firms' project managers and key team members had an opportunity to present each team's qualifications and respond to the evaluation committee's questions. Questions were related to addressing staffing availability, clarification of organization chart, as well as specific clarification questions related to each firm's proposal.

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

Qualifications of the Firm

Both firms demonstrated relevant experience providing public outreach for complex transportation projects during the pre-construction and construction phases, including maintaining and expanding the stakeholder database, planning and conducting multilingual outreach, compiling and providing communications metrics, and planning and executing small- and large-scale special events.

Kleinfelder was founded in 1986 and has 96 employees. The firm is headquartered in the City of San Diego and has an office in the City of Laguna Hills. The firm demonstrated extensive public outreach experience working on projects such as OCTA's I-405 Improvement Project and Active Transportation Outreach and Engagement Support Project, the Riverside County Transportation Commission's Interstate 15 Express Lanes Project, the San Bernardino County Transportation Authority's (SBCTA) I-5/Baseline Interchange Improvement Project, Orange County Public Works projects, as well as the City of Escondido's Citracado Parkway Extension Project. Kleinfelder proposed various subcontractors for community liaison, account coordinator,

and strategic advisor support. The firm received positive feedback from its references.

CPOG was founded in 2013 and is based in the City of Huntington Beach. The firm has 16 employees and has provided public outreach services on various projects with SBCTA, such as the State Route 210 Lane Addition/Base Line Interchange Project, the Interstate 10/Cedar Avenue Interchange Project, the Redlands Passenger Rail Project, and State Route 60/Archibald Avenue Interchange Project. CPOG is also currently providing public outreach services to OCTA on the SR-55 Improvement Project between I-405 and I-5. The firm proposed multiple subcontractors for videography, photography, social media support, translation, and community outreach support. CPOG received positive feedback from its references.

Staffing and Project Organization

Kleinfelder proposed a project team with extensive experience. The proposed project manager has 20 years of experience in community outreach and public relations and led outreach efforts on major projects such as the I-405 Improvement Project and the City of Escondido's Citracado Parkway Extension Project. The firm proposed a lead community liaison with 12 years of experience and an assistant community liaison with 16 years of experience. The proposed lead community liaison hosted the nine-part video series "Inside the 405" for the I-405 Improvement Project. The proposed lead community liaison's experience includes OCTA's I-405 Improvement Project and Active Transportation Outreach and Engagement Support Project. Additionally, the proposed project manager spearheaded development of the I-405 Improvement Project's ArcGIS Online Interactive Map. The firm proposed a team that consists of several senior-level staff with comprehensive freeway construction experience. The firm has a deep bench of staff to utilize as needed. Additionally, the team is cross-trained to ensure continuity and flexibility in outreach efforts should unexpected circumstances arise requiring additional support. The firm provided detailed responses during the interviews and elaborated on staff's experience, specifically highlighting that several key personnel are bilingual. As an added enhancement, the firm proposed having a strategist with construction management expertise available as needed, setting them apart by offering specialized guidance on critical issues.

CPOG proposed an experienced and knowledgeable project team. The proposed project manager is the founder of CPOG and has 32 years of public outreach experience, including managing outreach programs for several transportation projects throughout Southern California such as OCTA's SR-55 Improvement Project and SBCTA's I-10 Express Lanes Project. The

individual proposed to serve as lead community liaison has over 17 years of construction outreach experience and has worked on multiple interchange projects throughout San Bernardino County. The assistant community liaison has eight years of experience. Most of the project team are proposed with high availability and consist of senior and junior-level staff with experience engaging key stakeholders on various transportation and freeway projects. CPOG acknowledged that they are currently supporting three freeway improvement projects for OCTA, all of which are either starting or ongoing and will overlap with this Project's construction. Given that several team members, including key personnel, are working across multiple projects, there is concern that this could impact their ability to fully support this effort. During the interview, the project team's presentation demonstrated an understanding and familiarity with the Project corridor and stakeholders, which included key elements of the Project and specific examples of engaging impacted audiences. The team members demonstrated cohesiveness and provided detailed responses to the evaluation committee's questions, which emphasized their experience and individual strengths.

Work Plan

Kleinfelder presented a comprehensive work plan that addressed all the elements of the scope of work. The firm demonstrated its understanding of construction and the importance of providing timely and accurate information. Kleinfelder elaborated on the importance of utilizing social media technologies to educate the public and increase confidence in the Project, maintaining consistent messaging, content and responsiveness, and embracing emerging communication trends. The firm also highlighted the value of going beyond translation services to engage hard-to-reach audiences and the importance of leveraging faith-based organizations and Chambers of Commerce to establish proactive and positive relationships with community groups. The firm provided examples showcasing a strategic approach to community and active transportation outreach. The firm proposed a comprehensive campaign featuring print and digital content in multiple languages aligned with Orange County's demographics. Additionally, Kleinfelder proposed using the State and County demographic data tool from the California Environmental Protection Agency to assess outreach efforts with underserved communities. To further enhance engagement, the firm proposed collaborating with local community-based organizations, such as Santa Ana Active Streets, to participate in transportation-centered events, ensuring direct access to populations that would benefit from the information but are often underserved. To further support outreach efforts, the firm highlighted its unique partnership with Waze, which allows them direct access to reporting project closures to the Waze data feed, Apple maps, Google maps, and local navigation app editors,

helping drivers to navigate around traffic in real-time. The firm showcased its use of innovative multimedia communications tools such as ArcGIS story maps to share Project progress. Kleinfelder also provided examples of potential issues and proposed solutions, such as managing and coordinating multiple construction activities simultaneously, maintaining consistent and reliable response times, addressing last-minute schedule changes, and preparing for and responding to emergencies. During the interview, Kleinfelder's project team members provided real-world examples in their responses to the evaluation committee's questions to demonstrate their experience, understanding of the Project, and ability to implement a successful outreach program.

CPOG's work plan reflects a deep understanding of the Project. The firm provided clear and detailed plans for stakeholder ascertainment, constituent database development, and project communications, and identified specific facts about the Project corridor, such as extensive/ongoing construction fatigue, maintaining school access, and mutual aid between jurisdictions. CPOG prepared an initial stakeholder list showcasing its Project corridor knowledge to properly customize community outreach plans for each unique interest of specific stakeholders. CPOG demonstrated attention to detail and an understanding of the importance of consistency in branding, translations, and language. CPOG identified specific potential communications campaigns for closures, detours, and other construction impacts. CPOG discussed their experience with video simulations, sharing agency-approved real-time closure and detour information on the Waze app and Apple maps, helplines, text messaging, and social media including recommended social media platforms. Additionally, CPOG illustrated its experience with implementing geofencing ads, business support programs, media and government relations support, and special event planning. CPOG elaborated on special issues and mitigations, especially active transportation groups and the array of multicultural groups. In addition, during the interview, the project team members provided relevant examples in their responses to the evaluation committee's questions to demonstrate their experience, understanding of the Project, and ability to implement a successful outreach program.

Cost and Price

Pricing scores were based on a formula that assigned the higher score to the firm with the lower weighted average hourly rate and scored the other proposal's weighted average hourly rate based on its relation to the lower weighted average hourly rate. Kleinfelder proposed the lower weighted average hourly rate. Therefore, Kleinfelder's proposed hourly rates are deemed fair and reasonable.

Procurement Summary

Based on the evaluation of written proposals, the firms' qualifications, the information obtained from the interviews, as well as cost and price, the evaluation committee recommends the selection of Kleinfelder as the top-ranked firm to provide public outreach consulting services for the I-5 Improvement Project from I-405 to SR-55. Kleinfelder delivered a thorough and comprehensive proposal and a highly responsive interview addressing all the requirements of the RFP.

Fiscal Impact

The Project was approved in OCTA's Fiscal Year 2024-25 Budget, People and Community Engagement Division, account nos. 0017-7519-FB102-16H and 0017-7519-FB103-TKH.

Summary

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2488 between the Orange County Transportation Authority and Kleinfelder Construction Services, Inc., in the amount of \$1,199,260, for a six-year initial term with an option term of up to 24 months, to provide public outreach consultant services for the Interstate 5 Improvement Project from Interstate 405 to State Route 55.

Attachments

- A. Review of Proposals RFP 4-2488 Public Outreach for the Interstate 5 Improvement Project from Interstate 405 to State Route 55
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms) RFP 4-2488 Public Outreach for the Interstate 5 Improvement Project from Interstate 405 to State Route 55
- C. Contract History for the Past Two Years RFP 4-2488 Public Outreach for the Interstate 5 Improvement Project from Interstate 405 to State Route 55

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