



**December 9, 2024**

**To:** Members of the Board of Directors  
**From:** Darrell E. Johnson, Chief Executive Officer

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

**Subject:** Approval to Release Request for Proposals for Construction Management Support Services for the Interstate 5 Improvement Project Between Yale Avenue and State Route 55

**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 Interstate 5 Improvement Project between Yale Avenue and State Route 55.

**Recommendations**

- A. Approve the proposed evaluation criteria and weightings for Request for Proposals 4-2614 for the selection of a consultant to provide construction management support services for the Interstate 5 Improvement Project between Yale Avenue and State Route 55.
- B. Approve the release of Request for Proposals 4-2614 to provide construction management support services for the Interstate 5 Improvement Project between Yale Avenue and State Route 55.
- C. Authorize the use of up to \$22.7 million in Measure M2 freeway funds for construction management support services for the Interstate 5 Improvement Project between Yale Avenue and State Route 55.

**Discussion**

The Orange County Transportation Authority (OCTA), in partnership with the California Department of Transportation (Caltrans), is implementing the Interstate 5 (I-5) Improvement Project between Yale Avenue and State Route 55 (SR-55) (Project). The Project is part of Project B 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 both the southbound and northbound directions on I-5 between Yale Avenue and SR-55, re-establish auxiliary lanes, and improve the existing on- and off-ramps.

Final design for the Project is nearing completion with advertisement for construction bids targeted for mid-2025. OCTA staff proposes using Caltrans for the advertising, award, and administration of the construction contract. However, OCTA will support Caltrans by providing consultant field staff through this procurement for roadway and structures inspection, office engineer, scheduling, claims support, materials testing, environmental and paleontology monitoring, surveying, 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, 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 is currently being used for the I-5 Improvement Project between State Route 73 and El Toro Road, as well as the SR-55 Improvement Project between Interstate 405 and I-5.

This is Project B in the M2 freeway program, and the use of \$22.7 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 that the Board approve all requests for proposals (RFP) over \$1,000,000, as well as approve the evaluation criteria and weightings (C&W). Staff is submitting for Board approval the draft RFP and evaluation C&W, which will be used to evaluate proposals received in response to the RFP. The recommended evaluation C&W are as follows:

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

The evaluation C&W are consistent with criteria developed for similar architectural and engineering (A&E) procurements. Several factors were considered in developing the C&W. The firms' qualifications and experience in

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performing relevant work of similar scope, size, and complexity are important to the success of the Project. Staff proposes to give 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 understanding the project requirements and to the timely delivery and successful performance of the work. An equal level of importance is also assigned to the work plan, as the technical approach is critical to the successful performance and timely delivery 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 (FY) 2024-25 Budget and subsequent FY budgets, Capital Programs Division, Account No. 0017-9085-FB103-YYY, and will be funded with local M2 funds. Staff is seeking Board approval for \$22.7 million in M2 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 4-2614 for construction management support services for the Interstate 5 Improvement Project between Yale Avenue and State Route 55, as well as approval of the proposed evaluation criteria and weightings and authorize the use of up to \$22.7 million in Measure M2 freeway funds.

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***Attachment***

- A. Draft Request for Proposals (RFP) 4-2614, Construction Management Support Services for the Interstate 5 Improvement Project between Yale Avenue and State Route 55

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