



February 5, 2024

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for Construction Management Support Services for the State Route 91 Improvement Project Between Acacia Street and La Palma Avenue

Overview

On September 25, 2023, the Orange County Transportation Authority Board of Directors authorized the release of a request for proposals to provide construction management support services for the State Route 91 Improvement Project between Acacia Street and La Palma Avenue. Board of Directors' approval is requested to execute an agreement for these services.

Recommendations

- A. Approve the selection of Arcadis U.S., Inc. as the firm to provide construction management support services for the State Route 91 Improvement Project between Acacia Street and La Palma Avenue.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-3-2827 between the Orange County Transportation Authority and Arcadis U.S., Inc., to provide construction management support services for the State Route 91 Improvement Project between Acacia Street and La Palma Avenue.

Discussion

The Orange County Transportation Authority (OCTA), in partnership with the California Department of Transportation (Caltrans), is implementing the State Route 91 (SR-91) Improvement Project between Acacia Street and La Palma Avenue (Project). The Project is part of Project I in the Measure M2 (M2) freeway program and is being advanced through the updated Next 10 Delivery Plan approved by the OCTA Board of Directors (Board) in November 2023.

The project improvements include westbound (WB) operational improvements between Acacia Street and La Palma Avenue, WB improvements at State College Boulevard, and reconstruction of the La Palma Avenue overcrossing bridge. The Project will also provide a new bypass ramp that allows northbound (NB) State Route 57 (SR-57) traffic to exit at Orangethorpe Avenue in advance of the SR-91/NB SR-57 connector merge. The WB SR-91/NB SR-57 connector will be adjusted to accommodate the bypass ramp. The existing La Palma Avenue overcrossing bridge will be replaced with a new bridge that includes standard vertical clearance and four lanes with shoulders and sidewalks. Caltrans has also developed a multi-asset project (MAP) within the project limits that is funded by the State Highway Operation and Protection Program. Caltrans' MAP scope of work (SOW) includes pavement rehabilitation, existing safety device upgrades, census stations installation, lighting replacement, and conduit replacement. The MAP SOW was combined with the Project at 95 percent design, which was then submitted to Caltrans for review in April 2023.

Pursuant to the existing cooperative agreement with Caltrans for this Project, Caltrans will administer the construction contract. As the implementing agency for the construction phase, Caltrans will provide the resident engineer, structures representative, and other field personnel, along with construction administrative support and environmental monitoring. OCTA will provide consultant field staff for construction inspection, the office engineer, scheduling, claims support, materials testing, and field surveying. Through separate contracts, OCTA will lead the public outreach and freeway service patrol efforts.

Procurement Approach

This procurement was handled in accordance with OCTA's 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 approach. As this is an A&E procurement, price is not an evaluation criterion pursuant to state and federal laws. An 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 September 25, 2023, the Board authorized the release of Request for Proposals (RFP) 3-2827 which was electronically issued on CAMM NET. The Project was advertised on September 25 and October 2, 2023, in a newspaper of general circulation. A pre-proposal conference was held on October 5, 2023,

with 26 attendees representing 13 firms. Four 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 October 30, 2023, six proposals were received. An evaluation committee consisting of members from OCTA's Contracts Administration and Materials Management and Highway Capital Programs departments, as well as external representatives from Caltrans and the City of Anaheim, met to review all submitted proposals. The proposals were evaluated utilizing the following Board-approved evaluation criteria and weightings:

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

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm was weighted at 20 percent as the firm must demonstrate experience with construction management (CM) support services in performing relevant work of similar scope, size, and complexity. Staffing and project organization was weighted at 40 percent as the qualifications of the project manager (PM) and other key task leaders are critical to understanding the project requirements and to the timely delivery and successful performance of the work. Work plan was equally weighted at 40 percent as an understanding of freeway construction and other required critical activities, such as utility relocations and coordination, control of the contractor's work within temporary construction easement limits, and management of anticipated critical work elements in the risk register is critical to the success of the Project.

The evaluation committee reviewed the six proposals received, based on the evaluation criteria, and found three firms most qualified to perform the required services. The most qualified firms are listed below in alphabetical order:

Firms and Location

Arcadis U.S., Inc. (Arcadis)
Irvine, California

SYRUSA Engineering, Inc. (SYRUSA)
Brea, California

TRC Engineers, Inc. (TRC)
Irvine, California

On December 13, 2023, the evaluation committee interviewed the three short-listed firms. The interviews consisted of a presentation allowing each team to present its qualifications, highlight its proposal, and respond to the evaluation committee's questions. Each firm highlighted its staffing plan, work plan, and perceived project challenges. The firms were asked general questions regarding their approach to the requirements of the SOW, management of the Project, coordination with various agencies, experiences with similar projects, and solutions for achieving the project goals. After considering responses to questions asked during the interviews, the evaluation committee adjusted the preliminary scores for all three firms. Arcadis remained the top-ranked firm with the highest cumulative score.

Based on the evaluation of the written proposals and information obtained during the interviews, staff recommends Arcadis as the top-ranked firm to provide CM services for the Project. The firm ranked the highest among the proposing firms because it submitted a comprehensive proposal that was responsive to all the requirements of the RFP and presented a cohesive interview with focused responses to the interview questions, highlighting the firm's experience, qualified staff, and detailed work plan.

The following is a summary of the proposal evaluation results.

Qualifications of the Firm

All shortlisted firms are well established with recent and relevant experience and are qualified to perform CM support services for the Project. Positive references were received for all three firms.

Arcadis was founded in 1957 and has over 36,000 employees. With over 700 employees in California, the firm has specialized in transportation-related construction projects for Caltrans for the last 30 years. The firm has four offices in Southern California, and over 130 employees in its Orange County office. Arcadis has provided CM support services in Southern California for freeway widening, roadway improvements, interchange improvements, and bridge widening and replacement projects mostly as a prime consultant and as part of an integrated team. Arcadis has demonstrated proficiency in providing CM support services such as inspection for freeway widening, street improvements, bridge and retaining wall construction, traffic management, improved Americans with Disabilities Act pedestrian access, oversight of utility relocations, office engineering, scheduling, claims analysis, constructability review, and Caltrans and public agency coordination. The firm's project experience includes CM services on OCTA's Interstate 5 (I-5) Improvement Project between State Route 73 to Oso Parkway (I-5 Project Segment 1),

San Bernardino County Transportation Authority's (SBCTA) Interstate 15 (I-15)/Base Line Road Interchange and Widening (I-15/Base Line) Project, Riverside County Transportation Commission's (RCTC) I-15/Railroad Canyon Interchange Improvements Project, and the City of Mission Viejo's La Paz Bridge and Road Widening Project. The firm proposed to utilize three subconsultants. All proposed subconsultants have experience working with Arcadis and will support Arcadis with additional electrical inspection, field materials testing, and survey services.

TRC was founded in 1969 and has 16 offices in California with 700 employees, and 150 offices globally. The firm has an office in Orange County. TRC has demonstrated proficiency in providing CM support services, including inspections for freeway widening, bridge and retaining wall construction, traffic management, office engineering, and Caltrans and public agency coordination. The firm's project experience includes construction inspection and engineering services to Caltrans District 12 (D-12) for the Interstate 405 (I-405) Improvement Project (I-405 Project), design and CM services for I-405/Interstate 605 High-Occupancy Vehicle Connector (HOV), CM services for the I-5 Improvement Project between State Route 55 and State Route 57 (I-5 Central Project) and I-5 Project Segment 1, and Los Angeles County Metropolitan Transportation Authority's (LA Metro) I-5 North Improvements Project. The firm proposed to utilize eight subconsultants. The proposed subconsultants have experience working with TRC and are proposed to support TRC with additional roadway, structures, and electrical inspection, scheduling, field materials testing, and survey services.

SYRUSA was founded in 2009 and has two offices in Southern California with 19 employees. The firm specializes in transportation-related construction projects and structures construction inspection services for highways, bridges, grade separation and roadway construction projects. The firm's relevant experience includes CM support services for Interstate 10 Corridor Express Lanes Project (I-10 Project) for SBCTA, Caltrans District 8's SR-91 Corridor Improvements Project (CIP), Caltrans' Division of Engineering Services unit of headquarters' SR-91 Pachappa Union Pacific Bridge, and Caltrans District 7's State Route 210 (SR-210) Slab Replacement and Rehabilitation Project. The firm proposed to utilize four subconsultants. The proposed subconsultants have experience working with SYRUSA and are proposed to support SYRUSA with additional roadway and electrical inspection, scheduling, office engineering, field materials testing, and survey services.

Staffing and Project Organization

All short-listed firms proposed a qualified team of key personnel and subconsultants with relevant CM experience in freeway and bridge widening, and roadway and structures inspection, as well as working with Caltrans.

Arcadis proposed a qualified project team with each key personnel demonstrating relevant and comprehensive CM experience with freeway and bridge replacement projects. The team has demonstrated experience in roadway and structures inspections, utility relocations, bridge reconstruction, steel bridge demolition, traffic management plan and staging, and has extensive experience working with Caltrans. Arcadis presented several cross-trained staff in roadway inspection and structures inspection. Having cross-trained personnel provides efficiencies for OCTA by quickly mobilizing personnel who can bring different perspectives to the work based on the team's varied experiences.

The proposed PM has over 40 years of project management and CM experience on similar freeway/bridge construction projects and performed the PM role for OCTA's I-5 Project Segment 1 and SBCTA's I-15/Base Line and U.S. Route 395 (US 395) Widening Phase 1 projects. The proposed PM also performed as a resident engineer (RE) for SBCTA's I-15/Base Line and US 395 Widening Phase 1 projects. Arcadis' proposed senior roadway inspector has successfully delivered complex, intricately staged highway, bridge, and heavy civil infrastructure projects for 23 years, including over 20 years of general contractor experience. The proposed senior roadway inspector has extensive construction experience leading the construction activities and overseeing field operations for SBCTA's I-15/Base Line as a general contractor and RE, OCTA's I-5 South County Improvements Project between Vista Hermosa to Pacific Coast Highway (I-5 HOV Segment 2) as a general contractor and project manager, Caltrans District 11's I-15 Lane Design Sequencing Method Design Project as a superintendent, and LA Metro's G Line improvements as an RE.

Arcadis' proposed structures inspector has more than ten years of experience with various methods of bridge construction from pre-construction to closeout, and all aspects of structural improvements in the field, including falsework inspections, pre-fabrication bridge inspections, cast-in-place bridge inspections, bridge widening inspections, bridge demolition inspections, scaffolding system bridge construction, and various types of walls. The proposed structures inspector is cross-trained and has experience in both structures and roadway inspections. Relevant experience includes RCTC's I-15 Railroad Canyon Interchange Project as an RE; SBCTA's I-15/Base Line as the roadway inspector; and the Port of Long Beach's Gerald Desmond Bridge Replacement project as the structures field engineer.

The Arcadis team presented an interview demonstrating comprehensive knowledge of its proposed approach to the SOW, a clear understanding of the team's roles and responsibilities, and the process to resolve any potential challenges while keeping the Project on schedule. The team provided a project-specific presentation and responses to all interview questions, which further demonstrated the firm's experience and in-depth understanding of the SOW requirements, objectives, and risks associated with the Project. Additionally, the proposed senior roadway inspector and structures inspector's ability to lead the presentation and respond to questions demonstrated their depth of knowledge, which is notable as the individuals would be performing a large portion of the work for the Project as specified in the SOW.

TRC proposed a knowledgeable project team with CM experience. The team's expertise includes a range of relevant CM services, including roadway inspection, structures inspection, electrical inspection, and office engineering support, among other relevant expertise.

TRC's proposed PM has over 31 years of experience, including the I-405 Project as a principal-in-charge (PIC) for construction inspection and engineering services for Caltrans D-12, I-5 Project Segment 1, and I-5 Improvement Project between El Toro Road to Alicia Parkway (I-5 Project Segment 3) as PIC for OCTA, LA Metro's I-5 North Improvements as PIC, and the San Diego Association of Governments' on-call CM services as PM. Most of the PM's experience includes overseeing CM projects serving as the PIC.

TRC's proposed senior roadway inspector has 25 years of CM experience, including ten years as an RE on Caltrans roadway and facility projects. Relevant project experience includes assistant RE for OCTA's I-5 Central Project and I-5 HOV Segment 2, and for Caltrans D-12's SR-91 Widening Project. TRC's proposed structures inspector has over 30 years of experience in transportation engineering and CM. The relevant experience includes SBCTA's SR-210 Lane Addition and Base Line Interchange Project and Mount Vernon Viaduct Bridge Replacement Project as a CM, and the City of Palm Springs I-10/Indian Canyon Interchange Project as a structures representative.

The TRC team presented an interview demonstrating knowledge of its proposed project approach to the SOW and potential challenges. The team addressed all aspects of the interview questions with project-specific responses and discussed its proposed construction and sequence enhancements that could result in time and cost savings.

SYRUSA proposed a project team with relevant experience. The proposed PM has over 25 years of experience in engineering and construction. SYRUSA's proposed PM is a former Caltrans D-12's Acting District Director and Office Chief, and District 8 Area Construction Manager and Senior Bridge Engineer. Relevant project experience includes State Route 22, SR-91 Widening, RCTC's SR-91 CIP, and Caltrans District 8's I-15/Interstate 215 Devore Interchange Improvements Project.

SYRUSA's proposed senior roadway inspector has 30 years of CM experience on various highway and bridge construction projects. Relevant project experience includes RE and senior inspector for OCTA's Lakeview Avenue Grade Separation Project, senior inspector for Caltrans District 7's I-5 North Corridor Improvement Segment 3, roadway construction projects on various state routes, and on-call construction engineering and inspection services. SYRUSA proposed a structures inspector with over 24 years of experience in transportation infrastructure construction projects. The relevant experience includes the SBCTA's I-10 Project as a structures lead, Caltrans' Division of Engineering Services unit of headquarters' Express Lanes North Direct Connector, Ortega Highway Safety Improvements, Pachappa Union Pacific Rail Tie-In Project, and I-15 Express Lanes as a structures representative, and Caltrans District 8's SR-91 CIP project as a structures representative.

Although the proposed PM and key personnel were responsive to the interview questions overall, certain responses were general and lacked the level of detail necessary to effectively highlight the firm's knowledge and expertise.

Work Plan

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

Arcadis presented a project-specific and comprehensive work plan. The work plan included a complete discussion of project understanding, issues and challenges with realistic recommendations, and proposed solutions demonstrating the firm's knowledge and experience. The team identified the project risks and challenges, and demonstrated methodical, detailed, and well-thought-out approaches to address those risks with lessons learned from recent relevant projects in the proposal and during the interview. Approaches and solutions to challenges included management of full closures of the SR-91 and La Palma Avenue during demolition and bridge construction, early hazardous material testing and management of La Palma Avenue steel bridge demolition, early surveying, environmental monitoring, tracking environmental compliance, proactive management of noise, vibration and dust, and temporary

construction easements to minimize impacts to property owners and neighboring residents, identification of time-saving construction staging, coordination with adjacent projects, mitigation measures for all the potential risk items related to structures precast girders and piles, coordination of utility relocations, and proactive documentation and a detailed schedule for claims prevention. A detailed construction schedule was provided from the contractor's perspective that would be used to verify contractor's progress and changes to critical path workflow.

TRC presented an organized work plan with a project-specific approach for identified risks and responsiveness to all requirements identified in the SOW. The team demonstrated an understanding of the overall project issues and challenges. The work plan identified challenges and proposed solutions for utility work, bridge and retaining wall construction, construction staging, traffic management, electrical, and closeout. The sequential outline of activities provided proposed personnel responsibility by task. A construction schedule was provided with key activities. The team discussed its proposed construction sequence enhancements.

SYRUSA presented a work plan that demonstrated an understanding of the SOW and challenges. The work plan discussed project approach and risks associated with structures work, utility relocation, electrical work, traffic coordination, drainage construction, and environmental compliance. The work plan included risks and solutions to mitigate those risks, as well as sequential activities.

Procurement Summary

Based on the evaluation of the written proposals, team qualifications, work plan approach, and information obtained during the interviews, the evaluation committee recommends the selection of Arcadis as the top-ranked firm to provide CM support services for the Project. Arcadis delivered a comprehensive proposal which addressed all requirements of the RFP.

Fiscal Impact

Funding for the Project is included in OCTA's Fiscal Year 2023-24 Budget, Capital Programs Division, Account No. 0017-9085-FI104-0U9, and will be funded with a combination of net excess 91 Express Lanes revenue and local funds.

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Services for the State Route 91 Improvement Project Between
Acacia Street and La Palma Avenue

Summary

Staff requests Board of Directors' authorization for the Chief Executive Officer to negotiate and execute Agreement No. C-3-2827 with Arcadis U.S., Inc. as the firm to provide construction management support services for the State Route 91 Improvement Project between Acacia Street and La Palma Avenue.

Attachments

- A. Review of Proposals, RFP 3-2827 - Construction Management Support Services for the State Route 91 Improvement Project Between Acacia Street and La Palma Avenue
- B. Proposal Evaluation Criteria Matrix (Short-Listed), RFP 3-2827 Construction Management Support Services for the State Route 91 Improvement Project Between Acacia Street and La Palma Avenue
- C. Contract History for the Past Two Years, RFP 3-2827, Construction Management Support Services for the State Route 91 Improvement Project Between Acacia Street and La Palma Avenue

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