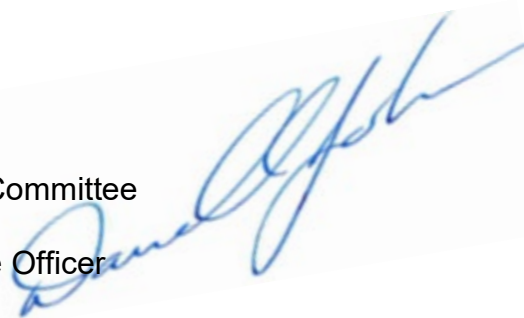




August 28, 2025

To: Regional Transportation Planning Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Consultant Selection for Construction Management Support Services for the Interstate 5 Improvement Project Between Interstate 405 and Yale Avenue

Overview

On April 14, 2025, the Orange County Transportation Authority Board of Directors authorized the release of a request for proposals to retain a consultant for construction management support services for the Interstate 5 Improvement Project between Interstate 405 and Yale Avenue. Board of Directors' approval is requested for the selection of a firm to perform the required services.

Recommendations

- A. Approve the selection of Jacobs Project Management Co. as the firm to provide construction management support services for the Interstate 5 Improvement Project between Interstate 405 and Yale Avenue.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-5-3961 between the Orange County Transportation Authority and Jacobs Project Management Co. to provide construction management support services for the Interstate 5 Improvement Project between Interstate 405 and Yale Avenue.

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 Interstate 405 (I-405) and Yale Avenue (Project). The Project is part of Project B 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 2024.

The Project will add a general purpose lane in both the northbound and southbound directions on I-5 between I-405 and Yale Avenue, re-establish existing auxiliary lanes, improve the existing on- and off-ramps, and include improved bicycle lane and pedestrian improvements at Jeffrey Road, Sand Canyon Avenue, and Alton Parkway. Separately, Caltrans has developed the plans, specifications, and estimates (PS&E) for a multi-asset project (MAP) within the same project limits, which includes pavement rehabilitation, safety device upgrades, a weigh-in-motion facility, additional signage, and electrical conduit replacements. The MAP scope is funded by the State Highway Operation and Protection Program, and the design plans have been combined with OCTA's PS&E package with all improvements to be advertised in one construction bid package. This will ensure efficient construction of all improvements and will minimize disruption to the traveling public, construction fatigue, potential construction conflicts, and redundant work.

Final design for the Project is complete with advertisement for construction bids targeted for later in 2025.

Cooperative Agreement No. C-5-4067 between Caltrans and OCTA outlines the responsibilities of both agencies for the Project and was approved by the Board on May 12, 2025. As specified in the cooperative agreement, Caltrans will be the implementing agency responsible for advertisement, award, and administration of the construction contract. Caltrans will also provide the resident engineer, structures representatives, and environmental services, along with a limited number of field personnel. OCTA will retain a construction management (CM) consultant firm to supplement Caltrans staff with structural, roadway, construction staking, office engineering, materials testing, surveying, and claims support services. OCTA's CM consultant will also provide a field office to house construction staff working on the Project. Through a separate contract, OCTA will lead the public outreach efforts for the Project.

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 federal and state 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. 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 April 14, 2025, the Board authorized the release of Request for Proposals (RFP) 5-3961 which was issued electronically on CAMMNET. The RFP was advertised in a newspaper of general circulation on April 14 and April 21, 2025. A pre-proposal conference was held on April 22, 2025, with 34 attendees representing 17 firms. Two addenda were issued to make available the pre-proposal conference registration sheets and presentation materials, provide responses to questions received, and address administrative issues related to the RFP.

On May 12, 2025, four proposals were received. An evaluation committee consisting of members from the Contracts Administration and Materials Management and Capital Project Delivery departments, as well as external representatives from Caltrans and the City of Irvine, met to review all submitted proposals. The proposals were evaluated based on 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 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 the technical approach to the Project is critical to the successful performance of the Project.

The evaluation committee reviewed the four 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

FALCON Engineering Services, Inc. (Falcon)
Headquarters: Temecula, California
Project Office: Fullerton, California

HNTB Corporation (HNTB)
Headquarters: Kansas City, Missouri
Project Office: Santa Ana, California

Jacobs Project Management Co. (Jacobs)
Headquarters: Dallas, Texas
Project Office: Irvine, California

On June 30, 2025, the evaluation committee interviewed the 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 the approach to the requirements of the scope of work, management of the Project, coordination with various agencies, experience with similar projects, and solutions for achieving the project goals.

Based on the evaluation of the written proposals and information obtained during the interviews, the evaluation committee recommends Jacobs as the top-ranked firm to provide CM support services for the Project. Jacobs ranked the highest among the proposing firms because it submitted a comprehensive proposal that was responsive to the requirements of the RFP, proposed a highly qualified and experienced team of key personnel, presented a work plan that demonstrated a thorough understanding of the overall project requirements, and presented a cohesive interview with focused responses to the specific 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 short-listed firms are well established with recent and relevant experience and are qualified to perform the services. Positive references were received for all three firms.

Jacobs was founded in 1947 and has five local offices across Southern California with access to more than 1,500 employees. Jacobs provides full CM services consisting of specialty inspections, permit compliance, and quality, schedule, and budget control. The firm has extensive experience in providing CM support services for complex freeway infrastructure projects. The firm has successfully delivered multiple projects for both OCTA and Caltrans over the past 20 years with recent experience that includes CM services for six major OCTA-led

freeway projects, notably the I-5 Improvement Project (Segments 2 and 3), the I-405 Improvement Project, and the I-5 Improvement Project between Avenida Pico and Vista Hermosa. These projects encompassed complex bridge construction, extensive utility relocations, and high-level stakeholder coordination, which align with the requirements of the scope of work.

Founded in 2007, Falcon is an engineering firm with over 18 years of experience providing CM and inspection services for transportation and public works projects. Falcon offers a full range of CM services, including resident engineering, structural and roadway inspection, materials testing coordination, and document control, with 65 employees across three offices in Southern California. Falcon has successfully supported major clients including Caltrans, OCTA, the Riverside County Transportation Commission, and numerous local jurisdictions. Notable projects that are similar in scope include the I-405 Improvement Project and the recent State Route 91 (SR-91)/State Route 71 (SR-71) Interchange Project in the City of Corona. The team has demonstrated experience working together on projects of similar size and scope with all five of the proposed subconsultants.

HNTB, founded in 1914, is a nationwide engineering and CM corporation with four local offices in Southern California with access to over 475 employees. With more than 200 staff located at its office in the City of Santa Ana, HNTB offers strong local presence and rapid response capabilities. The firm provides full CM services including, but not limited to, project management, resident engineering, structures inspection, and roadway inspection. The firm has successfully delivered CM support services for a wide range of freeway improvement projects for both OCTA and Caltrans. HNTB has extensive experience delivering capital improvement projects and has served as a prime consultant and integrated team member on the Los Angeles County Metropolitan Transportation Authority's SR-91 Improvement Project, where the firm was responsible for constructability reviews, bridge falsework submittals, and preparing and filing as-built drawings. The team has demonstrated experience working together on projects of similar size and scope with all four of the proposed subconsultants.

Staffing and Project Organization

All firms proposed experienced construction managers, key personnel, and subconsultants with relevant CM experience.

Jacobs proposed a highly qualified and experienced team of personnel with extensive backgrounds in CM, field inspection, structural and roadway engineering, environmental compliance, and office engineering. Each key personnel demonstrated relevant project experience on past OCTA and Caltrans projects, including the I-5 improvement Project (Segment 3) and the I-405 Improvement Project.

The proposed PM has over 33 years of experience in transportation CM, including oversight roles on Caltrans and OCTA freeway improvement projects. Relevant experience includes the management of the State Route 210 Mixed Flow Lane Addition Project and the I-5 Improvement Project (Segment 3) and will be responsible for overall project delivery.

The proposed deputy senior resident engineer brings more than 33 years of CM experience specializing in all aspects of project and construction management, including managing resources, budget, baseline critical path method schedule and updates, time impact analysis, and monthly reports. Similar project experience includes the SR-91 Roadway and Rehabilitation projects, Interstate 710 Widening Pavement Rehabilitation and Bridge Widening Project, and I-5 Improvement Project (Segment 3) where similar services were provided.

The proposed lead structural inspector is a structural expert with over 35 years of experience in bridge and structural construction with experience in all phases of construction. Previous experience in which similar services were provided includes both the I-405 and SR-91 Improvement projects.

The Jacobs team was well prepared for its interview and provided project-specific responses to questions with participation from all staff in attendance, which further demonstrated the firm's experience and understanding of the scope of work, project requirements, and risks associated with the Project. The team has demonstrated experience working together on projects of similar size and scope with all four of the proposed subconsultants.

Falcon proposed a streamlined and highly experienced team composed of professionals with specialized expertise in freeway widening, structural inspection, and Caltrans oversight support. The proposed PM has 35 years of experience in heavy civil design, CM, and inspection. Similar project experience includes the SR-91/SR-71 Interchange Project, State Route 60 Potrero Boulevard Interchange, and Interstate 10/Jefferson Street Interchange Project where the PM also provided similar services.

The proposed deputy senior resident engineer has 36 years of experience in complex transportation projects with expertise in quality management, claims

review, and ensuring contract compliance with Caltrans standards. Relevant project experience includes work in a similar capacity on the Hamner Avenue Bridge Replacement Project for Riverside County Transportation Department and the Limonite Gap Closure Project for the City of Eastvale.

The proposed structures inspector for Falcon has 39 years of experience in structural engineering with expertise in bridge widening, retaining walls, and complex foundation systems on freeway corridors and interchanges. Similar project experience includes working on the Mount Vernon Viaduct Project for the San Bernardino County Transportation Commission, and a state highway in Monterey County near Carmel-by-the Sea at Granite Canyon Bridge for Caltrans District 5.

The interview confirmed the technical knowledge and expertise of the Falcon team and its comprehensive understanding of the project challenges and requirements with participation from most of the staff in attendance.

HNTB proposed a qualified and experienced team of CM professionals, including key personnel that have limited experience working together on past projects. The proposed PM has 36 years of experience in transportation infrastructure design and CM. Similar project experience includes Caltrans' I-405 Multi-Asset Management Project.

The proposed deputy senior resident engineer has over 30 years of CM experience with expertise in strategic partnering, dispute resolution, and construction change orders. Relevant experience includes providing similar services for OCTA's SR-91 Westbound Lane Addition Project.

HNTB's proposed structures inspector has over 35 years of experience in transportation engineering and project management. Relevant project experience includes OCTA's I-405 Improvement Project and Caltrans' SR-57 Improvement Project.

The HTNB team was responsive to most of the evaluation committee's interview questions; however, some responses lacked the level of detail needed to 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.

Jacobs submitted a comprehensive work plan tailored to the Project. The work plan demonstrated Jacobs' strong familiarity with OCTA, Caltrans, and the project corridor, while outlining a phased CM strategy emphasizing risk mitigation, schedule coordination, and regulatory compliance. The work plan includes full-time support to augment Caltrans' resident engineer and structure representative with key activities, including pre-construction risk planning, utility coordination, full-time construction inspection, stakeholder coordination during construction, and closeout documentation and claims support at project completion. The work plan identifies 12 critical risks with mitigation strategies, such as advanced traffic signal coordination, utility clearance planning, and the use of drone technology and traffic analytics to minimize disruptions. A detailed project schedule was included and identified major services that would be provided throughout the life of the Project.

The work plan submitted by Jacobs outlined a thoughtful and strategic approach, incorporating experience gained by the firm's prior experience with similar projects. During the interview, the team effectively demonstrated its understanding of the scope of work, objectives, and associated risks. The team's responses to interview questions were detailed and tailored to the specific needs of the Project.

Falcon submitted a project-specific work plan that outlined a comprehensive approach to CM across all three project phases, which include the pre-construction, construction, and post-construction phases. The work plan emphasized early coordination, rigorous inspection protocols, and effective communication with stakeholders across all phases of the Project. Key elements of construction were discussed, including potential challenges and mitigation strategies related to the widening of the Irvine Overhead, modifications to census stations, and the integration of a weigh-in-motion facility. Falcon outlined its coordination approach with the adjacent I-5 Improvement Project team to prevent overlapping ramp closures and emphasized the importance of working closely with the public outreach team to keep the community informed of temporary ramp closures. The team also demonstrated an understanding of the need to minimize business impacts to the Irvine Spectrum area, particularly during work at the southbound Alton Parkway off-ramp.

Falcon'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 completing the tasks, and discussed project challenges. The interview confirmed the technical knowledge and expertise of the Falcon team and its comprehensive understanding of the project challenges and requirements. The Falcon team was responsive to the evaluation

committee's interview questions; however, there was limited participation from the proposed office engineer.

HNTB proposed a comprehensive, three-phase specific work plan that demonstrated a thorough understanding of the scope of work, schedule, and anticipated challenges. HNTB's approach emphasized comprehensive project readiness through early pre-construction coordination with key stakeholders, including Caltrans, OCTA, and the City of Irvine to confirm permits and commitments, alongside identifying utility conflicts and establishing a detailed potholing plan. In addition, HNTB would perform constructability reviews, schedule evaluations, and system setups such as FalconDMS for effective tracking. During construction, the firm would provide on-site oversight with a multidisciplinary team performing daily inspections, environmental monitoring, stakeholder coordination, structural assessments, and proactive cost and risk management. The post-construction phase focuses on efficient closeout through punch list inspections. The work plan identified several critical risk areas and provided mitigation strategies specific to the Project.

The overall approach to project execution described in the work plan and presented during the interview demonstrated an understanding of the scope of work, challenges, risks, and project requirements. The HNTB team was responsive to the evaluation committee's interview questions; however, there was limited participation from the proposed roadway inspector and responses to the questions were general.

Fiscal Impact

Funding for this Project is included in OCTA's Fiscal Year (FY) 2025-26 Budget and subsequent FY budgets, Capital Programs Division, Account No. 0017-9085-FB102-1OC, and will be funded with a combination of federal, state, and local M2 funds.

Summary

Staff requests Board of Directors' authorization for the Chief Executive Officer to negotiate and execute Agreement No. C-5-3961 with Jacobs Project Management Co., as the firm to provide CM support services for the I-5 Improvement Project between I-405 and Yale Avenue.

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Attachments

- A. Review of Proposals, RFP 5-3961 - Construction Management Support Services for the Interstate 5 Improvement Project Between Interstate 405 and Yale Avenue
- B. Proposal Evaluation Criteria Matrix (Short-Listed), RFP 5-3961 - Construction Management Support Services for the Interstate 5 Improvement Project Between Interstate 405 and Yale Avenue
- C. Contract History for the Past Two Years, RFP 5-3961 – Construction Management Support Services for the Interstate 5 Improvement Project Between Interstate 405 and Yale Avenue

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