



June 12, 2023

To: Members of the Board of Directors

From: Darrell E. Johnson, Chief Executive Officer

Subject: Consultant Selection for Construction Management Services for the Transit Security and Operations Center Project

Overview

On November 14, 2022, the Orange County Transportation Authority Board of Directors authorized the release of a request for proposals to retain a consultant to provide construction management services for the Transit Security and Operations Center project. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the selection of Anser Advisory Management, LLC, as the firm to provide construction management services for the Transit Security and Operations Center project.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-2-2643 between the Orange County Transportation Authority and Anser Advisory Management, LLC, to provide construction management services for the Transit Security and Operations Center project.

Discussion

The Transit Security and Operations Center (TSOC) project (Project) will be a new facility designed to State of California building standards for current and future operational needs and requirements of the Orange County Transportation Authority (OCTA). Planned uses for the TSOC include OCTA essential services, including an emergency operations center, central communications (dispatch), field operations, security and emergency preparedness, transit police, technical infrastructure, and personnel to support OCTA operations.

The OCTA Planning Department completed the master planning and site selection for the TSOC. A site in the City of Anaheim (City), located at 1512-20 West Lincoln Avenue owned by OCTA, was the preferred site recommended for the TSOC. In late 2019, the Board of Directors (Board) approved the selection of a consultant to prepare plans, specifications, and estimates for the TSOC; this work effort began in June 2020. Final design is 90 percent complete and currently in plan check at the City of Anaheim and Division of the State Architect. Upon completion of plan check, the design consultant will complete final design work scope for issuance an invitation for bid for construction. Construction management consultant resources are being secured to allow the consultant to familiarize themselves with the Project and for support during the project bid phase.

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. 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 14, 2022, the Board authorized the release of Request for Proposals (RFP) 2-2643 which was electronically issued on CAMM NET. The Project was advertised on November 14 and November 21, 2022, in a newspaper of general circulation. A pre-proposal conference was held on November 22, 2022, with 49 attendees representing 15 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 January 9, 2023, six proposals were received. A responsiveness review was conducted and determined that all six proposals were responsive to the 14 percent Disadvantaged Business Enterprise goal. An evaluation committee consisting of members from OCTA's Contracts Administration and Materials Management, Facilities Engineering, Rail Programs, Strategic Planning, and General Services departments, met to review all submitted proposals. The proposals were evaluated utilizing the following Board-approved evaluation criteria and weightings:

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- 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. Staffing and project organization 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 proposals 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:

Firm and Location

Anser Advisory Management, LLC (Anser)
Santa Ana, California

Hill International, Inc. (Hill)
Irvine, California

MARRS Services, Inc. (MARRS)
Fullerton, California

On February 21, 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 evaluation committee questions. Each firm also discussed its 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. All firms were asked questions specific to each firm's proposal regarding its team's approach to the requirements of the scope of work, management of the Project, experience with similar projects, and the proposed solutions towards achieving project goals. After considering responses to the questions asked during the interviews, the evaluation committee adjusted the preliminary scores for all three of the firms; however, Anser remained as the top-ranked firm with the highest cumulative score.

Based on the evaluation of written proposals and information obtained during the interviews, staff recommends Anser as the top-ranked firm to provide construction management (CM) services for the Project. Anser received the highest ranking due to its recent transit security and operations facilities experience with projects of similar scope and scale, familiarity with Federal Transit Administration (FTA) 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, demonstrated a clear understanding of the project requirements, and presented a comprehensive work plan addressing key issues that are critical to the success of the Project. The following is a brief 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.

Anser is a national firm that 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 within California such as the Los Angeles County Metropolitan Transportation Authority (LA Metro), California High-Speed Rail Authority, California Department of Transportation (Caltrans), and the Riverside County Transportation Commission. Anser has 21 offices nationwide, which include four in California, including the corporate headquarters located in the City of Santa Ana. Relevant firm experience includes LA Metro's Center Street project – Emergency Security Operations Center (ESOC), the City of Long Beach's Emergency Communications and Operation Center, and the City of Signal Hill's Police Station and Emergency Operations Center. The team has demonstrated experience working together on projects of similar size and scope with seven of the eight proposed subconsultants. Positive references were received for the firm.

Hill provides program, project, and CM services for major construction projects on a global level. In addition to having provided services to OCTA and the City of Anaheim, Hill has provided CM services for Caltrans, as well as various federal agencies, such as the FTA and General Services Administration. The firm has six offices throughout California, including an office in the City of Irvine. Hill recently provided CM services on similar projects, including the Santa Cruz Metropolitan Transit District (SCMTD) Judy K. Souza Operations Building and the South Sound 911 Public Safety Communications Center. Hill proposed to utilize seven subconsultants in a wide range of disciplines to provide services

required by the scope of work. Five of the subconsultants have experience working with Hill on past projects. Positive references were received for the firm. MARRS provides services in the areas of project management, CM, project controls, engineering design, and environmental compliance. The firm has four offices within California located in the cities of Fullerton, Riverside, and San Diego, where the firm's headquarters is located. Recent relevant security and transit operation projects include the Los Angeles World Airports LAX Airport Police Headquarters Facility and LA Metro's Division 13 Bus Operations and Maintenance Facility. MARRS proposed to utilize ten subconsultants in which seven of the firms have worked with MARRS on past projects. Positive references were received from the firm.

Staffing and Project Organization

All firms proposed experienced construction managers, key personnel, and subconsultants with relevant CM experience in similar transit security and operations facilities.

Anser 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 in essential services buildings in Southern California. The proposed construction manager has 20 years of CM and resident engineering experience that also includes five years of FTA funding experience and work on the ESOC for LA Metro which is an essential facility serving as a central location for LA Metro's emergency preparedness and security operations. The proposed assistant resident engineer has 15 years of CM, design management, and resident engineering experience and is currently serving as the project manager for two essential services building projects, which are of similar characteristics to the TSOC facility. The overall team proposed by Anser includes subconsultants that provide a depth of resources such as building commissioning, utility coordination, safety consulting, soils and materials testing, and quality assurance surveying to address the special needs of the Project.

Hill proposed an experienced project team with each key personnel demonstrating relevant and comprehensive CM experience with the construction of essential services buildings. The team is proficient in the various disciplines required for the Project, has extensive recent experience working with both OCTA and FTA, and understands the requirements of both agencies. Hill's proposed construction manager has over 40 years of experience in construction management, project engineering, and commissioning. Similar projects that the proposed CM has led include the SCMTD's Judy K. Souza Operations Building, serving as the county emergency operations center, and the Tucson International Airport Terminal Optimization project which addressed the

expanding security demands of the airport. The proposed CM is licensed as a mechanical, rather than a civil, engineer as required by the scope of work. The proposed assistant resident engineer has more than 25 years of multi-disciplined experience in CM, design, and construction on transportation and facility projects as well as an in depth understanding of FTA funding requirements. The proposed team includes qualified and experienced subconsultants for communication systems integration, structural observations, and environmental compliance.

MARRS proposed a project team and subconsultants with relevant experience in essential services buildings in Southern California. The proposed construction manager has over 40 years of experience and has exclusively worked in this role for the past 20 years on transit facility projects involving site conditions, building features, and systems similar to OCTA's TSOC building. Relevant project experience includes LA Metro's Division 13 Bus Operations and Maintenance Facility, OCTA's Santa Ana Bus Base, and the Norwalk Transit Center. The firm proposed an assistant resident engineer with 30 years of experience with the past 20 years focusing on the role of assistant resident engineer and project scheduling. However, the proposed staff displayed limited experience with the construction of emergency operations centers. The proposed subconsultants provide a wide range of disciplines including environmental and building commissioning services as required by the scope of work.

Work Plan

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

Anser presented a comprehensive and viable work plan that demonstrated an understanding of the project requirements as an essential service building, including physical security of the building, threat and vulnerability assessment and mitigation measures, understanding the client operational needs to ensure the operational readiness of the facility from start date, and identification and implementation of emerging technology ensuring TSOC is expandable and upgradeable with new systems for future needs. The work plan identified four enhancements that would benefit the Project, including enhanced overall security via proprietary R-SHIELD technology, a review of applicable codes and standards for essential facilities, low voltage/smart technology innovation measures, and building information modeling, all of which have been utilized on recent similar projects. Anser highlighted the importance regarding the lead time for materials and equipment to ensure timely delivery of the Project. The work plan provided a detailed narrative as to how the CM services would be provided based off lessons learned from previous similar successful projects Anser has completed in addition to maintaining the project schedule.

The overall approach described in the Anser work plan highlighted enhancements that were built upon previous similar experience and knowledge that would adhere to the standards of the governing agencies for essential facilities. 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.

Hill provided a detailed work plan that demonstrated an understanding of the project scope of work, issues, and risks. The work plan included a complete discussion of the firm's three-phase approach to complete the tasks specified and detailed the activities that would be undertaken to complete those tasks. During the pre-construction phase, Hill proposed to prepare a construction management plan that will capture agreed-upon procedures, project expectations, and lines of communication that would become the basis of managing the construction contractor. Hill would then verify that the contractor has complied with all requirements necessary to begin the Project at the start of the construction phase of the Project. As part of the closeout phase, Hill proposed to utilize a punch list to capture any remaining work as well as conduct field inspections to ensure all work has been completed in accordance with the project documents. Hill identified ten potential project issues in its proposal and provided realistic recommendations and proposed solutions demonstrating the firm's knowledge. Some examples include potential long-lead items for materials to verify if they are available or if a substitution would need to be identified, underground obstruction discovered during grading and foundation work, and utility work that may require additional property agreements to construct. Hill also provided a thorough discussion about maintaining the overall project budget and schedule.

Hill'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 the Hill team and its comprehensive understanding of the project challenges and requirements. The firm presented an interview with detailed responses from all personnel to the evaluation committee questions, demonstrating an experienced cohesive team with relevant project experience.

MARRS presented a work plan that demonstrated an understanding of the project scope of work and challenges. The work plan detailed the challenge that the irregular shape of the project site presents, as well as it being bordered by a major traffic corridor and the Union Pacific railroad. MARRS demonstrated its experience with a similar situation on a recent LA Metro project and would apply lessons learned to resolve this challenge to ensure successful project completion on budget and schedule.

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 MARRS team was responsive to the evaluation committee's interview questions; however, there was limited participation from the proposed construction manager and responses were handled by the proposed project manager.

Procurement Summary

Based on the evaluation of the written proposals, team qualifications, and information obtained during the interviews, the evaluation committee recommends the selection of Anser as the top-ranked firm to provide construction management services for the Project.

Fiscal Impact

The Project is included in Orange County Transportation Authority's Fiscal Year 2022-23 Budget, Capital Programs Account No. 0030-9085-D3143-00I and is funded through Federal Transit Administration and State of California SB 1 (Chapter 5, Statutes of 2017) grant funds revenue account nos. 0030-6042-D3143-JOW and 0030-6110-D3143-YNJ.

Summary

Staff requests Board of Directors' authorization for the Chief Executive Officer to negotiate and execute Agreement No. C-2-2643 with Anser Advisory Management, LLC, as the firm to provide construction management services for the Transit Security and Operations Center project.

Attachments

- A. Review of Proposals, RFP 2-2643 Construction Management Services for the Transit Security and Operations Center
- B. Proposal Evaluation Criteria Matrix (Short-Listed), RFP 2-2643 Construction Management Services for the Transit Security and Operations Center
- C. Contract History for the Past Two Years, RFP 2-2643 Construction Management Services for the Transit Security and Operations Center

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