




May 1, 2023

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 State Route 55 and Lakeview Avenue

Overview

On December 12, 2022, 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 State Route 55 and Lakeview Avenue. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the selection of WSP USA Inc., as the firm to provide construction management support services for the State Route 91 Improvement Project between State Route 55 and Lakeview Avenue.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-2-2919 between the Orange County Transportation Authority and WSP USA Inc., to provide construction management support services for the State Route 91 Improvement Project between State Route 55 and Lakeview 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 State Route 55 (SR-55) and Lakeview 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 2022.

The Project will improve freeway operations within the SR-91/SR-55 interchange area by separating westbound (WB) SR-91 traffic from southbound (SB) SR-55 traffic through the realignment of the existing WB SR-91 on- and off-ramps to direct traffic to WB SR-91 and the addition of a new on-ramp from the Lakeview Avenue bridge that connects directly to SB SR-55. The existing Lakeview Avenue overcrossing bridge will be replaced with a new bridge that will include six 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. The Caltrans MAP scope includes pavement rehabilitation, existing safety device upgrades, census stations installation, lighting replacement, conduit replacement, and Smart Street Lighting. The Project and MAP 100 percent design plans were combined and submitted to Caltrans as one package in late March 2023. The construction contract is expected to be advertised for bids by Caltrans in fall 2023.

OCTA staff proposes that Caltrans 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 Board-approved procedures for 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, pursuant to state and federal laws, price is not an evaluation criterion. 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 December 12, 2022, Request for Proposals (RFP) 2-2919 was issued electronically on CAMM NET. The RFP was advertised in a newspaper of general circulation on December 12 and 19, 2022. A pre-proposal conference was held on December 20, 2022, with 17 attendees representing five firms.

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Three 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 January 23, 2023, four proposals were received. An evaluation committee consisting of staff from OCTA's Contracts Administration and Materials Management and Highway Programs departments, as well as external representatives from Caltrans and the City of Anaheim, met to review the 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 criteria and weightings. The firms' qualifications and experience in performing relevant work of similar scope, size, and complexity are important to the success of the Project. Next, staff assigned a high level of importance to staffing and project organization, 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. An equal level of importance is also assigned to the work plan, 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 and discussed the four proposals received based on the evaluation criteria and found two firms most qualified to perform the required services. The most qualified firms are listed below in alphabetical order:

Firms and Location

Harris and Associates, Inc. (Harris)
Irvine, California

WSP USA Inc. (WSP)
Orange, California

On March 14, 2023, the evaluation committee interviewed the two short-listed firms. The interviews consisted of a presentation allowing each team to discuss its qualifications, highlight its proposal, and respond to evaluation committee 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 scope of work (SOW), management of the Project, coordination with various agencies, experiences with similar projects, and solutions in achieving the Project goals. After considering the presentations and responses to questions asked during the interviews, the evaluation committee adjusted the preliminary scores for WSP. However, WSP remained as the top-ranked firm with the highest cumulative score.

Based on the evaluation of the written proposals and information obtained during the interviews, the evaluation committee recommends WSP as the top-ranked firm to provide construction management (CM) support services for the Project. WSP submitted a comprehensive proposal that was responsive to the requirements of the RFP and presented a cohesive interview highlighting the firm's experience, staffing, and the technical approach to the work plan.

Qualifications of the Firm

The two shortlisted firms are qualified to perform the required services and have demonstrated expertise in providing CM services. Both firms are established firms with the resources and relevant experience providing construction inspection services for freeway and bridge replacement projects. Positive references were received for both firms.

WSP is a national firm that was founded in 1885 and has 66,000 technical and professional staff across the United States. The firm has four offices in Southern California, and over 190 staff in its Orange County office. With over 130 CM staff in California, the firm has specialized in transportation-related local construction projects for the last 30 years. WSP has provided CM support services in Southern California for freeway widening, roadway improvement, interchange/overcrossing replacement, and bridge replacement projects as a prime consultant and as part of an integrated team.

WSP has demonstrated proficiency in providing CM support services such as inspection for freeway widening, street improvements, bridge and retaining wall construction, electrical installation, traffic management, oversight of utility relocations, office engineering, scheduling, claims analysis, constructability review, and Caltrans and public agency coordination. Similar project experience includes CM services on a Transportation Corridor Agency (TCA) contract for

program management and specialty support services, including constructability review services, the Port of Long Beach's Gerald Desmond Bridge Replacement and Interstage 710 (I-710) Connectors, San Gabriel Valley Council of Governments' (SGVCOG) Fairway Drive Grade Separation and Lemon Avenue Interchange, and OCTA's Interstate 5 (I-5) South County Improvements between Avenida Pico and Avenida Vista Hermosa (I-5 high-occupancy vehicle (HOV) Segment 1), I-5 South County Improvements between Vista Hermosa to Pacific Coast Highway (I-5 HOV Segment 2), Interstate 405 (I-405)/State Route 22 (SR-22) HOV Connector, and I-405/Interstate 605 (I-605) HOV Connector. Most of the proposed subconsultants have experience working with WSP and will support WSP with additional construction inspection, field materials testing, and survey services.

Harris is a California firm that was founded in 1974 and has specialized in transportation-related construction projects for Caltrans for over 30 years. The firm has eight offices in California with 251 employees and 90 CM staff, with five offices in Southern California. Harris has provided CM support services in Southern California for freeway widening, freeway interchange construction, and bridge construction as a prime consultant as well as part of an integrated team.

Harris has demonstrated proficiency in providing CM support services, including inspections for freeway widening, bridge and retaining wall construction, electrical installation, traffic management, office engineering, scheduling, and Caltrans and public agency coordination. Examples of relevant experience include CM support services for OCTA's I-405 Improvement Project Design-Build (DB) (I-405 DB Project) and I-405/SR-22 HOV Connector, and the California High-Speed Rail Authority's High-Speed Rail (HSR) Construction Package 1. The proposed subconsultants have experience working with Harris and are proposed to support Harris with additional construction inspection, office engineering, field materials testing, and survey services.

Staffing and Project Organization

Both short-listed firms proposed qualified PMs, key personnel, and subconsultants with relevant CM experience in freeway and bridge widening, and roadway and structure inspection.

WSP 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, traffic management plan and staging, and has extensive experience working with

Caltrans. WSP's proposed PM has over 30 years of project management and CM experience on similar freeway/bridge construction projects and performed the PM role for OCTA's I-5 Improvement Project between SR-55 and State Route 57, I-5 HOV Segment 2, and SGVCOG's Fairway Drive Grade Separation and Lemon Avenue Interchange. The proposed PM also performed as a contract manager/task manager for the I-405 DB Project and for the construction engineering and inspection services contract for Caltrans, and for the On-Call Program and Signage Enhancements project for TCA, as well as a principal assistant resident engineer (RE) for I-405/I-605 HOV Connector project.

WSP's proposed senior roadway inspector has successfully delivered freeway and bridge widening, bridge replacement, and interchange improvement projects for over 30 years. While at Caltrans, the proposed senior roadway inspector managed the SR-91 Slab Replacement and Express Lane Pavement Rehabilitation from SR-55 to Riverside County Line, I-5 HOV Segment 1, I-405/SR-22 HOV Connector, and I-5 Improvement Project from La Paz Road to Oso Parkway as a senior construction engineer/senior RE. Additional relevant experience includes serving as the senior RE for TCA's On-Call Program and Signage Enhancements project.

WSP's proposed structure inspector has more than 18 years of experience with various methods of bridge construction, administering all phases of construction from beginning to closeout, including multi-span freeway interchange connector bridges, bridges over major highways, bridges over creeks and rivers, and various other types of bridges and walls. The proposed structure inspector has delivered 17 pre-cast girder bridges and demonstrated knowledge and experience during the interview. With pile driving analyzer certification, the proposed inspector is a readily available resource to mitigate potential pile conflicts with the existing bridge. Relevant experience includes OCTA's I-5 Improvement Project from Oso Parkway to Alicia Parkway, Caltrans' I-710 Freeway Widening, San Bernardino County Transportation Authority's Interstate 15/Baseline Road Interchange Improvements, and Caltrans' 60 SWARM Three Bridge Replacements as structure inspector/assistant structure representative, as well as TCA's On-Call Program and Signage Enhancements project as structures constructability reviewer.

WSP presented a 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 WSP 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. All team members contributed detailed responses to interview questions.

Harris proposed a qualified project team with CM experience. The team's expertise includes a range of relevant CM services, including roadway inspection, structures inspection, electrical inspection, and scheduling support, among other relevant expertise. Harris' proposed PM has over 33 years of professional consulting experience, including HSR Construction Package 1 and OCTA's I-405 DB Project as principal-in-charge, the City of Torrance's Pacific Coast Highway at Hawthorne Boulevard Intersection Improvements for the design phase as project director, and the Interstate 10 Interchange Project Study Report as assistant PM.

Harris' proposed senior roadway inspector has 27 years of experience with Caltrans in all aspects of infrastructure projects, mostly in construction. Relevant project experience includes RE for the I-405 DB Project Segment 2, assistant PM for I-405/I-22 HOV Connector, assistant structures representative for SR-22 DB, and PM/RE for Riverside County Transportation Department's Sunset Avenue Grade Separation project.

Harris proposed a structures inspector with over 31 years of experience in design, construction, and surveying. The proposed inspector is a former Caltrans employee and performed as the senior bridge engineer/structure representative for State Route 60/91/215 Design Sequencing Interchange, provided oversight on locally funded projects in Riverside County, and was the RE for the State Route 60/91 project. Additional relevant experiences include the I-405 DB Project Segment 1 as a lead engineer, and Riverside County Transportation Commission's SR-91 Improvements project as senior structures RE.

The proposed PM and key personnel were responsive to interview questions; however, there was limited participation from other personnel. In addition, some responses to specific questions were general and did not fully address the interview questions.

Work Plan

Both short-listed firms met the requirements of the RFP, and each firm discussed its approach to the Project, identified risks, and discussed utility relocation, quality, budget, and schedule control methods.

WSP presented a Project-specific and comprehensive work plan. The work plan included a complete discussion of Project issues and challenges with realistic recommendations and proposed solutions demonstrating the firm's knowledge and experience. The team identified the top three project risks and demonstrated methodical, detailed, and well-thought-out approaches to address those risks throughout the proposal and interview. Solutions to challenges included timely monitoring of utility relocations, coordination on electrical compliance, proactive management of temporary construction easements (TCE) to minimize impacts to property owners, identification of time-saving construction staging, identification of a maintenance of traffic (MOT) plan for long-term ramp closures, mitigation measures for all the potential risk items related to structures precast girders, and proactive documentation for claims prevention.

A clear map illustrating the step-by-step construction staging of Lakeview Avenue bridge reconstruction over the 91 Express Lanes was presented. The work plan also identified many critical issues that may be encountered, along with proposed mitigations supported by relevant project experience. The workplan described the efforts needed to minimize impacts and prevent delays to the overall project schedule. A detailed construction schedule was provided with potential schedule savings related to construction staging and the identification of potential schedule risk elements.

Harris presented an organized work plan with a Project-specific approach for identified risk elements. 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, MOT, and TCEs. The sequential outline of activities provided proposed personnel responsibility by task throughout the Project. A detailed construction schedule was provided with critical elements highlighted. The Harris team presented an interview demonstrating knowledge of its proposed approach to the SOW.

Procurement Summary

Based on the evaluation of the written proposals, team qualifications, and information obtained during the interviews, the evaluation committee

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recommends the selection of WSP as the top-ranked firm to provide CM support services for the Project.

Fiscal Impact

Funding for the Project will be included in OCTA's proposed Fiscal Year 2023-24 Budget and subsequent fiscal year budgets, Capital Programs Division, Account No. 0017-9085-FI106-10Q and will be funded with a combination of net excess 91 Express Lanes revenue, and federal and state grants.

Summary

Staff requests Board of Directors' authorization for the Chief Executive Officer to negotiate and execute Agreement No. C-2-2919 with WSP USA Inc., as the firm to provide construction management support services for the State Route 91 Improvement Project between State Route 55 and Lakeview Avenue.

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Attachments

- A. Review of Proposals, RFP 2-2919 Construction Management Support Services for the State Route 91 Improvement Project Between State Route 55 and Lakeview Avenue
- B. Proposal Evaluation Criteria Matrix (Short-Listed), RFP 2-2919 Construction Management Support Services for the State Route 91 Improvement Project Between State Route 55 and Lakeview Avenue
- C. Contract History for the Past Two Years, RFP 2-2919, Construction Management Support Services for the State Route 91 Improvement Project Between State Route 55 and Lakeview Avenue

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