



February 16, 2021

To: Members of the Board of Directors
From: Donna DeMartino, Managing Director *Donna DeMartino*
Subject: Consultant Selection for Program Management Consultant Services for the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency

Overview

On November 16, 2020, the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency Board of Directors authorized the release of a request for proposals for program management consultant services to assist staff in the management and delivery of projects, including oversight, planning, environmental clearance, engineering, right-of-way acquisition, and construction activities to support the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency. Board of Directors' approval is requested to execute an agreement for these services.

Recommendations

- A. Approve the selection of RailPros, Inc. as the firm to provide program management consultant services to the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency.
- B. Authorize the Managing Director to negotiate and execute Agreement No. L-0-0016 between the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency and RailPros, Inc., for an initial term of three years, with one two-year option term to provide Program Management Consultant Services to the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency.

Discussion

Since 2015, the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) has received a total of \$379,975,538, in funding through the Transit and Intercity Rail Capital Program (TIRCP), State Rail Assistance (SRA) funding, and programmed State Transportation Improvement Plan and Proposition 1B funds of which \$225,604,328 remains for the planning, design, and construction

of various capital infrastructure projects along the LOSSAN rail corridor that the LOSSAN Agency is either leading or helping to fund and oversee.

These projects include the design and construction of new or expanded layover and maintenance facilities for the Pacific Surfliner intercity passenger rail service in San Luis Obispo, Goleta, and San Diego; a grade separated pedestrian crossing at the Camarillo station; a second track and platform in Carpinteria; and bridge replacements along the Santa Barbara Subdivision. Additionally, future planned projects may include build-out of the new maintenance and layover facilities, track and station improvements, facility rehabilitation projects, equipment overhauls, and other improvements that will benefit passenger rail service and system safety.

Program management consultant (PMC) services will assist LOSSAN Agency staff with technical expertise and staff augmentation to help manage the development and delivery of capital projects.

Procurement Approach

This procurement was handled in accordance with LOSSAN Board of Directors (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. 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 the LOSSAN Board-approved procurement policies.

On November 16, 2020, the LOSSAN Agency Board authorized the release of Request for Proposals (RFP) 0-2620. The project was advertised in a newspaper of general circulation on November 16 and 23, 2020. A pre-proposal conference was held virtually on November 19, 2020, with 34 attendees representing 22 firms. Three addenda were issued to provide a copy of the pre-proposal conference registration sheets and presentation, provide responses to questions received, and address administrative issues related to the RFP.

On December 16, 2020, four proposals were received. An evaluation committee consisting of LOSSAN Agency staff, Orange County Transportation Authority staff from the Contracts Administration and Materials Management Department, and the Capital Projects Department met to review all proposals received. The proposals were evaluated based on the following Board-approved evaluation criteria and weights:

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|-------------------------------------|------------|
| • Qualifications of the Firm | 35 percent |
| • Staffing and Project Organization | 40 percent |
| • Work Plan | 25 percent |

In developing the criteria weightings, several factors were considered. Staff assigned 35 percent to qualifications of the firm, as they must be knowledgeable in the specific areas identified in the scope of work (SOW) and capable of supporting the necessary level of effort over the term of the contract. Staff assigned the greatest level of importance to the staffing and project organization criterion, as the project manager, subconsultant teams, and the key team members must demonstrate their experience and ability in working with the railroads, as well as local regulatory and environmental agencies. Additionally, the selected firm's ability to manage and support a variety of capital programs along the LOSSAN rail corridor is critical to timely project delivery. The work plan is assigned a lower weighting overall, as the work will be directed and provided by the LOSSAN Agency. As this is an architectural and engineering procurement, price is not an evaluation criterion pursuant to state and federal laws.

The evaluation committee reviewed and discussed all proposals based on the evaluation criteria and short-listed the two most qualified firms listed below in alphabetical order:

Firm and Location

Mott MacDonald Group, Inc. (MM)
Orange, California

RailPros, Inc (RailPros)
Irvine, California

On January 14, 2021, the evaluation committee interviewed the two firms. The interviews consisted of a presentation allowing each firm to present its qualifications, highlight its personnel, and respond to evaluation committee questions. Questions were asked relative to the firms' understanding of the SOW, plan for personnel integration with LOSSAN Agency staff, methodology for working with key stakeholders, as well as specific clarification questions related to each firm's proposal. In general, each team's presentation addressed the requirements of the RFP, highlighted the project team's experience working on related projects, its staffing plans, and stressed the firm's commitment to the success of the project. After considering the responses to the questions asked during the interview, the evaluation committee adjusted their preliminary scores for both firms. RailPros remained the top-ranked firm with the highest cumulative score.

Based on the evaluation of written proposals and information obtained from the interviews, staff recommends RailPros as the firm to provide PMC services for the LOSSAN Agency. RailPros' proposal ranked highest among proposing firms. The firm proposed a qualified project team with adequate availability including stakeholder and technical experts to help as needed. RailPros also presented a detailed workplan drawing on past experience to develop a workplan tailored to the LOSSAN Agency. Finally, the firm was able to provide clear and well-thought-out responses to questions asked during the interview. The following is a summary of the proposal results.

Qualifications of the Firm

Both short-listed firms are well established with recent, relevant experience and are qualified to perform the requested services.

RailPros was founded in 2000, and currently employs 685 employees nationwide in 13 offices including its local Irvine office. RailPros is a rail focused firm with strong financial metrics. RailPros demonstrated recent, relevant experience with San Bernardino County Transportation Authority (SBCTA) serving as SBCTA's Program Manager for the Redlands Passenger Rail Program in which they provided a host of services including, but not limited to: project management, coordination for third-party agreements, operations, maintenance, California Public Utilities Commission applications. Additionally, RailPros served as the LOSSAN Corridor Program Manager for the San Diego Association of Governments (SANDAG) which included a full scope of services for the management of 21 rail improvement projects. RailPros prior similar work includes experience with Southern California Regional Rail Authority (SCRRA), BNSF Railway, and Union Pacific Railroad providing services such as on-call design, staff augmentation, and engineering services. RailPros proposed to provide eight subconsultants with a wide range of disciplines in order to provide all the services required by the SOW. RailPros also detailed its prior working experience with the proposed subconsultants on past projects.

MM was founded in 2001 and currently employs 2,400 employees in North America with 8 California offices, including its local Orange office. MM is a multi-disciplinary engineering, employee-owned firm. MM is currently a subconsultant on the Orange County Transportation Authority's (OCTA) Rail PMC and provides technical specialization and document and project control services. Similarly, MM provides, as a subconsultant to OCTA's OC Streetcar PMC, project controls, scheduling, and document control services using SharePoint. MM also discussed its role as SBCTA's on-call transit and rail consultant, helping SBCTA secure a \$30 million grant as well as various other program management and engineering services. MM proposed a team of 16 subconsultants and noted its experience working together.

Staffing and Project Organization

Both firms proposed a qualified project team with rail and PMC experience, utilizing a team of subconsultants to provide additional technical expertise.

RailPros proposed a project team with recent, relevant experience. The proposed project manager (PM) has over 14 years of experience managing rail projects, most recently assisting in program management on the SANDAG LOSSAN Corridor which included 21 projects and served as the PM for the Los Angeles County Metropolitan Transportation Authority (LA Metro)/SCRRA Van Nuys North Platform Project. RailPros' PM detailed their experience with stations and facilities along the LOSSAN rail corridor, all of which have required stakeholder coordination, specifically with various transportation agencies and municipal agencies. Both the proposed project controls and document control individuals have recent experience on the Redlands Passenger Rail Program for SBCTA providing scheduling, budgeting, and procurement services. RailPros proposed a team of stakeholder advisors who are experts in the specific agencies along the corridor who can provide their knowledge to navigate and partner with those agencies. RailPros also described its prior working relationships with its team of subconsultants. During the interview, RailPros discussed the teams' past working relationship with each subconsultant and how they helped each subconsultant.

MM proposed a team of qualified staff. The proposed project manager has over 10 years of experience related to managing rail projects, most recently providing the engineering design of three passenger rail capacity improvement projects for LA Metro, and also served as a PM for the Mount Vernon Viaduct Replacement for SBCTA. The project controls specialist is currently supporting the Orange County Transportation Authority (OCTA) under the PMC contract for the Capital Programs Division providing support for various capital projects. The document control/contract manager is also currently supporting OCTA's Capital Programs Division providing right-of-way coordination and support. MM proposed a bench of 16 subconsultants to provide the technical expertise needed for this project. Although MM proposed adequate availability for key staff in their proposal MM was asked to provide clarification on the availability of proposed personnel currently working under OCTA contracts during the interview, and while MM emphasized overall commitment to the project, the response was not clear about personnel's current commitments.

Work Plan

Both short-listed firms met the requirements of the RFP, and each firm proposed a work plan that addressed elements of the SOW, demonstrating an understanding of the required services.

RailPros presented a work plan that was inclusive of the elements identified in the SOW. A specific approach for the delivery of each element of the SOW was provided

and supported with specific project details. RailPros described its customized project management information systems (PMIS) with examples of the program summary dashboard and project detail dashboard, which were also presented during the interview. RailPros proposed to provide this tool to help aid in the overall management of various LOSSAN Agency projects. The proposal included a discussion on potential issues critical to the program such as, stakeholder coordination, third party agreements, additional funding, and managing rolling stock, among others, with proposed solutions. Other work plan elements were addressed, such as quality control, planning, and grant funding. During the interview, RailPros demonstrated the PMIS tailored to the LOSSAN Agency and described how it can be automated to track ongoing projects. The key personnel also provided thorough responses to questions, drawing on experience to respond to a question asking them to apply their workplan approach to a potential LOSSAN Agency project.

MM's work plan presented an approach that addressed the elements of the SOW identified in the RFP. The proposal included a project management plan with details such as: project cost and schedule controls, risk management, quality, documentation management, and communication plans. MM also described its software, SmartInsights, that captures relevant project details to aid in project controls. Other work plan elements such as quality control, planning, and grant funding were also addressed. During the interview, MM emphasized that its familiarity with OCTA processes would aid in its ability to apply their workplan approach to LOSSAN Agency projects.

Procurement Summary

Based on the evaluation of the written proposals, team qualifications, work plan, and information obtained from the interviews, the evaluation committee recommends the selection of RailPros as the top-ranked firm to provide PMC services for the LOSSAN Agency. RailPros presented a comprehensive proposal, a qualified team of key personnel resources to provide all required services, and demonstrated a thorough understanding of the requested services.

Fiscal Impact

The LOSSAN Agency's approved Fiscal Year (FY) 2020-21 Annual Business Plan and budget programmed \$766,000 for professional services that will be used to fund the PMC services contract for the remainder of this fiscal year. There is currently \$775,000 in administrative funds for professional services identified for this contract in the draft FY 2021-22 Annual Business Plan and budget. The administrative funding available for the contract next fiscal year and subsequent fiscal years will be adjusted to align with the approved budget and funding provided by the state. The available administrative funding will also be supplemented by approximately \$1 million in other grants and state funding, including TIRCP, Proposition 1B, and SRA funds.

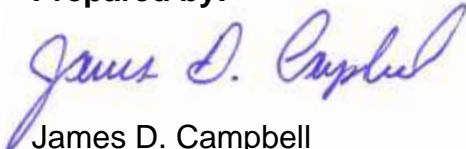
Summary

Staff requests Board of Directors' approval for the Managing Director to negotiate and execute Agreement No. L-0-0016 with RailPros, Inc., for an initial term of three years, with one two-year option term to provide program management consultant services to the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency.

Attachments

- A. Review of Proposals, RFP 0-2620 Program Management Consultant Services for the LOSSAN Agency
- B. Proposal Evaluation Criteria Matrix ("Short-Listed Firms"), RFP 0-2620 Program Management Consultant Services for the LOSSAN Agency
- C. Contract History for the Past Two Years, RFP 0-2620 Program Management Consultant Services for the LOSSAN Agency

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