



# Memorandum

## AGENDA ITEM 10

**DATE:** April 20, 2022

**TO:** Transportation Authority Board

**FROM:** Maria Lombardo - Chief Deputy

**SUBJECT:** 05/10/2022 Board Meeting: Award Contracts to Seventeen Shortlisted Consultant Teams for a Three-Year Period, with an Option to Extend for Two Additional One-Year Periods, for a Combined Amount Not to Exceed \$8,000,000 for On-Call Project Management and Engineering Services

**RECOMMENDATION**    Information    Action

- Award Contracts to Seventeen Shortlisted Consultant Teams for a Three-Year Period, with an Option to Extend for Two Additional One-Year Periods, for a Combined Amount Not to Exceed \$8,000,000 for On-Call Project Management and Engineering Services
- Authorize the Executive Director to Negotiate Contract Payment Terms and Non-Material Contract Terms and Conditions

**SUMMARY**

On February 17, 2022, we issued a Request for Qualifications (RFQ) for on-call project management and engineering services to augment and complement our internal resources over the next three years, up to a maximum of five years. These firms will serve as an on-call supplement to staff particularly for oversight and delivery support for major capital projects, handling tasks during peak workloads, and taking on tasks requiring specialized expertise and quicker response times than existing staff resources alone could permit. The establishment of contracts with multiple consultant teams will enable us to enlist the services of a broad range of engineering consultant specialists on an on-call task order basis. By the due date of March 21, 2022, we received twenty-six Statements of Qualifications (SOQs) in response to the RFQ. Interviews were held between April 5 and 14, 2022. Based on this competitive selection process, the review panel, with participation from Caltrans and the Transportation Authority, recommends the award of consultant contracts to the seventeen top-ranked teams: Access Planning Ltd.; Alta Planning + Design Inc.; Arup North America Ltd.; Brierley Associates; Cole Management & Engineering, Inc.; Dabri, Inc.; Gall Zeidler Consultants, LLC; HNTB Corporation; Mark Thomas & Company; McMillen Jacobs Associates; Mott MacDonald Group, Inc.; Parisi Transportation Consulting; Parsons Transportation Group, Inc.; PGH Wong Engineering, Inc.; TY Lin International; WMH Corporation; and WSP USA, Inc.

- Fund Allocation
- Fund Programming
- Policy/Legislation
- Plan/Study
- Capital Project Oversight/Delivery
- Budget/Finance
- Contract/Agreement
- Other: \_\_\_\_\_



## **BACKGROUND**

In all of our core roles - transportation sales tax administrator, Congestion Management Agency (CMA), Program Manager for the Transportation Fund for Clean Air (TFCA), Prop AA administrator, Treasure Island Mobility Management Agency (TIMMA), and Traffic Congestion Mitigation Tax administrator - we have responsibility for project delivery support and oversight of a wide range of projects covering all modes of surface transportation, such as the Downtown Rail Extension, Caltrain Modernization, and many transit, bike, pedestrian, and streetscape projects led by the San Francisco Municipal Transportation Agency and others. In addition, we have project development and implementation responsibilities for several major capital projects, such as design and construction of the Yerba Buena Island Interchange Improvement project, I-280 Interchange Modifications at Balboa Park, and planning and project development of freeway corridor management studies.

On-call project management and engineering services are intended to augment and complement our internal resources by providing specialized expertise, serving as an on-call supplement to staff (particularly for oversight and delivery support for major capital projects), handling tasks during peak workloads, and taking on tasks requiring quicker response times than existing staff resources alone would permit. We have used on-call engineering and other consultant firms in the past to expedite project delivery and expand the skillset and resources available to us. In addition to our involvement with major capital projects such as those listed above, we oversee all other projects and programs in the Prop K and Prop AA Expenditure Plans; we provide oversight and support for the TFCA projects programmed by us; and in our capacity as CMA, we assist project sponsors in meeting timely use of funds deadlines and delivering projects funded with federal, state, and/or regional sources.

Since May 2017, on-call project management and general engineering construction services have been provided by twenty-eight teams. Current contracts with these twenty-eight teams will expire in April 2022. Consistent with our Procurement Policy, contracts, including all options therein, are generally limited to a maximum period of five years.

## **DISCUSSION**

We are seeking project management and engineering teams with expertise in project management and project controls; project oversight and monitoring; project development and delivery support services; and engineering and technical services.

The consultant scope of services is included in Attachment 1.

**Procurement Process.** We issued an RFQ for on-call project management and engineering services on February 17, 2022. We held a virtual pre-submittal conference on February 24, 2022, which provided opportunities for small businesses and larger firms to meet and form partnerships. One-hundred-thirty firms registered for the conference.

We took steps to encourage participation from small and disadvantaged business enterprises, including advertising in seven local newspapers: the San Francisco Chronicle, the San Francisco Examiner, the San Francisco Bay View, Nichi Bei, the Small Business Exchange, El Reportero, and the World Journal. We also distributed the RFQ, the registration list for the pre-submittal conference, and periodic updates on the RFQ process to certified small, disadvantaged, and local businesses, Bay Area and cultural Chambers of Commerce, and the Small Business Councils.



By the due date of March 21, 2022, we received twenty-six SOQs in response to the RFQ. The selection panel evaluated the SOQs based on qualifications and other criteria identified in the RFQ, with an emphasis on bidders' management and technical capabilities and experience. In addition, the review panel evaluated each team's strengths and weaknesses in each specialty area for which the proposer sought consideration and reviewed the prime consultant's references. We held interviews with five qualified teams between April 5 and April 14, 2022. Twelve other qualified teams advanced without interviews due to the quality of the SOQs, prior working experience with us, and the familiarity of staff with previous work performed by these firms. Interviews were conducted by a selection panel comprised of staff representatives from Caltrans and the Transportation Authority.

Based on the competitive process defined in the evaluation criteria of the RFQ document, the selection panel recommends awarding contracts to the seventeen highest-ranked firms: Access Planning Ltd.; Alta Planning + Design Inc.; Arup North America Ltd.; Brierley Associates; Cole Management & Engineering, Inc.; Dabri, Inc.; Gall Zeidler Consultants, LLC; HNTB Corporation; Mark Thomas & Company; McMillen Jacobs Associates; Mott MacDonald Group, Inc.; Parisi Transportation Consulting; Parsons Transportation Group, Inc.; PGH Wong Engineering, Inc.; TY Lin International; WMH Corporation; and WSP USA, Inc.

Given the wide range of desired proficiencies and experience, the amount and complexity of our work program, the management of conflicts of interest that periodically arise for specific efforts, and the need to ensure availability of qualified support, we require broad and deep access to relevant skills in the on-call project management and engineering contract. We propose to contract with multiple consultant teams with whom we may call upon on a task order basis. Such an arrangement is currently in place through our existing on-call project management and general engineering contracts, which have proved beneficial to the agency's project development and oversight work program. The recommended firms together provide us with multiple options for each task in the Scope of Services. Details of each firm's areas of expertise and proposed subconsultants are included in Attachment 2.

Shortlisted consultants selected for a contract will remain eligible for consideration for task order negotiation on an as-needed basis for the initial three-year term. To maintain an open and competitive process, task orders will be awarded through an additional qualifications-based selection procedure within the shortlisted consultants. All shortlisted consultants will be invited to submit proposals and/or participate in oral interviews as part of the task order negotiation process. While we intend to engage pre-qualified firms based on capabilities, experience and availability, no selected team is guaranteed a task order. In addition, task orders valued above \$1,200,000, in other words 15% of total contract value, will be procured under a separate competitive Request for Proposal process.

We will receive federal financing assistance to fund a portion of this contract and we have and will continue to adhere to federal procurement regulations. For this contract, we established an overall Disadvantaged Business Enterprise (DBE) goal of 12%, accepting certifications by the California Unified Certification Program. SOQs from all seventeen teams met or exceeded the DBE goal. In addition, we will establish DBE, Small Business Enterprise, and/or Local Business Enterprise goals for each subsequent task order request, based on the project's funding sources and specific scope of work. All seventeen prime consultants' firms are



headquartered in states not on the Banned State List, which includes those states with laws that restrict abortion access or discriminate against LGBT individuals.

## **FINANCIAL IMPACT**

The scope of work and first year's activities described in the RFQ are included in our adopted Fiscal Year 2021/22 budget amendment and Preliminary Fiscal Year 2022/23 work program and budget through relevant projects and studies. Budget for these activities will be funded by a combination of federal, state and/or regional grants from Caltrans and the Metropolitan Transportation Commission, local contributions from City and County of San Francisco, and Prop K sales tax funds. Sufficient funds will be included in future fiscal year budgets to cover the cost of these contracts.

## **CAC POSITION**

The Community Advisory Committee will consider this item at its April 27, 2022, meeting.

## **SUPPLEMENTAL MATERIALS**

- Attachment 1 - On-Call Project Management and Engineering Services Scope of Work
- Attachment 2 - Shortlisted Respondents per Areas of Expertise
- Attachment 3 - Past On-Call Project Management Oversight and General Engineering Assigned Task Orders

## Attachment 1

### On-Call Project Management and Engineering Services

#### Scope of Work

The Transportation Authority is the lead agency for the following major capital projects and project phases, and therefore acts in a project management capacity for these projects and project phases:

**I-80/Yerba Buena Island (YBI) Interchange Improvement Projects** - In its role as CMA, the Transportation Authority works with the Treasure Island Development Authority (TIDA) and Caltrans on the development and implementation of the I-80/Yerba Buena Island Interchange Improvement Projects. The construction phase of West Side Bridges Seismic Retrofit project will begin in 2022, and the Transportation Authority also expects to move forward with detailed design of the Hillcrest Road Widening project in 2022.

**YBI Multi-Use Pathway** - The Transportation Authority completed a Yerba Buena Island/Treasure Island Multi-Use Pathway Feasibility Study in 2020 and is working to environmentally clear the project by 2023. The extended path will connect the existing Bay Bridge East Span YBI bike path landing to Treasure Island via Hillcrest and Treasure Island Roads. The limits for the project will extend from the existing San Francisco Oakland Bay Bridge (SFOBB) East Span Bike Landing/Vista Point, on south eastside of YBI, to the intersection of Macalla Road and Treasure Island Road on the northwest side of the island. The project will improve the current roadways on YBI, which do not meet modern standards by building separate and protected pathways for pedestrians and bicyclists. The project is coordinating with the Bay Area Toll Authority's Bay Bridge West Span Skyway project and will provide a YBI connection to the Skyway project.

**I-280 Interchange Modifications at Balboa Park** - Following environmental clearance of the southbound I-280 off-ramp at Ocean Avenue, the Transportation Authority is beginning the design phase to improve multimodal safety. The project will realign the existing off-ramp from a free flow right turn to a signalized T-intersection. The project will also widen the off-ramp to two lanes and construct a retaining wall. The effort also includes further development of other elements from the Transportation Authority's Balboa Park Station Area Circulation Study (2014), including potential modifications of the northbound I-280 off-ramp at Geneva Avenue to improve traffic circulation and reduce queuing on the off-ramp.

**Managed Lanes on US 101 and I-280** - In its role as CMA, and with close coordination with Caltrans, neighboring counties, and regional bodies like the Bay Area Infrastructure Financing Authority, the Transportation Authority is evaluating strategies including freeway lane management, operations technologies, and transportation demand measures to improve performance and manage growth of freeway traffic on I-280 and US-101. The effort will include environmental clearance and design phase documents led by the Transportation Authority over the next five years.

**TIMMA Infrastructure Projects** - In its role as TIMMA, the Transportation Authority has been preparing policy and governance recommendations for comprehensive mobility management, including congestion pricing, water transportation, and transit improvements. The Transportation Authority will have primary responsibility for building and operating congestion pricing infrastructure and procuring ferry service operators, as well as cooperating responsibility with associated transit, street, bicycle, and walking improvement projects.

**Bi-County Projects** - The Transportation Authority, in partnership with the SFMTA and regional partners, is developing recommendations for improved transit and active mobility connections

between the southern neighborhoods. Recommendations will propose short-term improvements to transit access, striping, and signage, and identify larger projects for further development.

**Pennsylvania Avenue Extension (PAX):** The City and County of San Francisco (City) has identified Pennsylvania Avenue as the preferred alignment for a future tunneled replacement segment of the Caltrain Corridor, south of the 4th and King/Townsend area. The Transportation Authority is leading pre-environmental phase planning and design for the PAX project, in coordination with local and regional partner agencies. Future anticipated phases include environmental review and preliminary design.

As a major funding partner (including sales tax and other Transportation Authority-programmed funds) and sub-regional planning authority, the Transportation Authority provides project development/delivery support and oversight for the following projects:

**Caltrain Modernization (CalMod):** The CalMod program is currently under construction and consists of electrification and other projects that will upgrade the performance, efficiency, capacity, safety, and reliability of Caltrain's service. The Transportation Authority is a funding partner and has oversight responsibility focused on three CalMod projects totaling more than \$2 billion including electrification of the existing corridor, installation of a modern positive train control system, and replacement of diesel trains with electric multiple-unit vehicles. Through integrated oversight of the CalMod Program and the Downtown Rail Extension Project (DTX), as well as support for the California High-Speed Rail (CAHSR) program, the Transportation Authority provides coordination of these related efforts for San Francisco.

**Downtown Rail Extension (DTX):** The Transportation Authority is one of six agencies currently working together to plan, design, and develop the DTX to ready-for-procurement status, under the terms of a Memorandum of Understanding (MOU) executed in 2020. The Transportation Authority is also a funding partner for the DTX. The project will extend heavy rail from the current terminus to the recently completed Salesforce Transit Center, to serve Caltrain and future CAHSR. Design development efforts are being led by the Transbay Joint Powers Authority (TJPA) with active support by the MOU partners. The Transportation Authority has lead or co-lead responsibilities for multiple tasks identified in the MOU, including the Funding Plan, Delivery Strategy, Demand Forecasts, and Governance Review.

**4th and King Railyards:** The Transportation Authority is one of several public and private parties working together to develop integrated plans for the development and operation of the current northern terminus of Caltrain, at the 4th and King Station and adjacent railyards. The site is home to significant passenger, operational, and maintenance functions. Plans for the site have an important relationship to development of the Caltrain system, the DTX project, and the introduction of CAHSR service along the peninsula.

**California High-Speed Rail (CAHSR):** The Transportation Authority supports this important project by coordinating with City agencies and monitoring the California High-Speed Rail Authority's planning and project development for issues of concern to San Francisco. Through involvement in the associated DTX and CalMod programs, the Transportation Authority provides additional coordination of these related efforts with CAHSR.

In addition to its involvement with the major capital projects described above, the Transportation Authority oversees all of the other projects and programs in the Prop K and Prop AA Expenditure Plans and the Transportation Authority-administered portion of the Traffic Congestion Mitigation Tax Program; provides oversight and support for the TFCA projects programmed by the Transportation

Authority; and in its capacity as CMA, assists project sponsors in meeting timely use of funds deadlines and delivering projects funded with federal, state or regional funds.

### **Scope of Services**

The Transportation Authority seeks consultant services with expertise in the four tasks described below.

#### **TASK 1 - Project Management and Project Controls**

The purpose of Task 1 is to provide consultant services to manage capital projects and project studies led by the Transportation Authority. Task 1 encompasses direct project management support services and comprehensive project controls services. Task 1 is intended to support projects at all stages of planning, development, and delivery.

Project Management support services through Task 1 will augment and enhance the project management capacity of Transportation Authority staff. Specific Project Management services are anticipated to include:

- Serve as consultant project manager or deputy project manager for projects and project studies led by the Transportation Authority.
- Prepare for and/or lead project progress meetings between consultants, the Transportation Authority, and other involved agencies; prepare and distribute minutes; execute and monitor action items.
- Develop and manage project scopes of work and workplans; monitor and report on progress; adjust project workplans as required/directed.
- Develop and manage project budgets; monitor expenditures and report against project funding and percent completion.
- Develop and manage project schedules; review baseline schedules and make proposals for revision; advise on activity dependencies.
- Monitor and manage projects issues and risks; develop and implement risk mitigations and issue resolutions.
- Review technical deliverables and coordinate/manage multi-party review processes.
- Provide full-service Construction Management services, including but not limited to field management, contract management, schedule management, quality management, reporting, review of construction management plans, review and reporting of project progress, issue and risk management, and all other required construction management activities.
- Provide input into cooperative agreements, memoranda of understanding, and coordination agreements.
- Support inter-agency processes for project development, including with Caltrans, Federal Transit Administration (FTA), Federal Railroad Administration, Federal Highway Administration (FHWA), and the City.
- Support other project management activities as directed.

Project Controls services provided through Task 1 will provide a flexible level of support to the Transportation Authority, depending on the needs and stage of specific projects. The specific requested Project Controls services will include:

- Provide integrated project reporting on a monthly or quarterly basis to satisfy funding requirements, support internal and partner review, and monitor project progress; develop and manage reporting templates; provide all necessary coordination to prepare, review, and submit reports.
- Provide comprehensive control of project budgets and expenditures, including work breakdown structure, cost controls, expenditure tracking, and forecasting; integrate with related controls activities (e.g., schedule management).
- Provide comprehensive schedule management and control; prepare and maintain detailed Critical Path Method (CPM) schedules, including all project activities and phases; prepare and maintain graphic/Gantt Chart presentations of summary schedules; coordinate regular updates to schedules, including inputs from multiple parties.
- Develop and implement records management procedures, including document control, templates, archiving, and project communications.
- Lead and provide Quality Assurance/Quality Control (QA/QC) activities/services, including development and execution of quality management plans, development and execution of QA/QC procedures, and QA/QC coordination; quality management procedures will be consistent with project requirements, including those of funding agencies (e.g., Caltrans, FHWA, FTA, etc.).
- Provide necessary and appropriate controls services for construction phase projects, including review and analysis of invoices, review and analysis of project submittals, review and analysis of contract modifications, earned value analysis, advice for contract negotiations, and other services as needed.
- Prepare and maintain management and controls plans (e.g., project management, quality management, controls, risk management, configuration management, etc.).
- Establish and process project controls documents and transmittals.
- Support other project controls activities as directed.

Areas of expertise include:

- 1.1 Project Management Support Services
- 1.2 Construction Management
- 1.3 Inter-agency Processes
- 1.4 Project Controls
- 1.5 Schedule Development
- 1.6 Quality Assurance and Project Management Plans

## **TASK 2 - Project Oversight and Monitoring**

The purpose of Task 2 is to provide consultant services for the Transportation Authority's oversight and monitoring of projects led by other agencies, including projects in development and in delivery. The Transportation Authority provides routine monitoring and oversight of small and medium-scale projects, as well as enhanced oversight of major projects, particularly those with a significant investment of funds allocated and/or programmed by the Transportation Authority.

Project Oversight and Monitoring through Task 2 will augment and enhance the capacity of Transportation Authority staff. Specific services include:

- Work with Transportation Authority and partner agency staff to develop oversight protocols and procedures.



- Advise on oversight requirements for specific projects, and prepare oversight management plans for major projects, subject to an enhanced level of oversight.
- Conduct oversight of design development, including preliminary design, final design, and constructability; incorporate technical support/advice from appropriate engineering disciplines and other areas of technical expertise.
- Conduct oversight of other project development disciplines, including environmental, financial/funding, and construction preparation.
- Conduct oversight of procurement documentation and plans, including specifications, requirements, procurement management plans, procurement processes, etc.
- Conduct oversight of construction-phase work, including budget management, construction activity, risk and contingency management, decision-making, and project schedule/delivery progress.
- Conduct independent reviews of technical work products, such as review of contract documents, constructability reviews of design and/or construction plans; prepare technical memoranda to document independent findings; participate in review sessions with project sponsors and their advisors.
- Develop and maintain relationships, as directed, with partner agency project staff and consultants, as necessary to fulfill oversight functions.
- Develop standard and project-specific reporting templates for projects overseen by the Transportation Authority.
- Prepare monthly and/or quarterly reports for applicable projects, to record project activities, status, risks, issues, budget/funding status, schedule progress, and other information.
- Support other project monitoring and oversight activities as directed.

Areas of expertise include:

- 2.1 Project Development and Design Phase Oversight
- 2.2 Environmental Oversight and Monitoring
- 2.3 Project Procurement Oversight
- 2.4 Construction Phase Oversight

### **TASK 3 - Project Development and Delivery Support Services**

The purpose of Task 3 is to provide strategic advisory and technical services to support the Transportation Authority and its partner agencies in developing projects for delivery readiness, as well as supporting key functional activities during delivery.

Project Development and Delivery Support Services through Task 3 will augment and enhance the capacity of Transportation Authority staff. Specific Development and Delivery Support services include:

- Develop and maintain project funding plans; advise on funding sources, funding strategy, and financial arrangements; review funding plans prepared by other agencies.
- Conduct major project financial analyses; build and maintain project financial models; develop financial plans; conduct value for money analysis; review financial plans, models, and analyses prepared by other agencies.
- Review planning and design documents for feasibility, constructability, and construction sequencing; facilitate and/or participate in constructability workshops.

- Advise on project delivery, procurement, and contracting methods, including traditional, integrated, collaborative, and alternatively-financed approaches; identify opportunities for innovative project delivery methods; develop comparative options analyses and recommend delivery approaches; prepare integrated delivery strategies incorporating design/requirements, risks, market context, funding/financing, governance, procurement, and operations.
- Advise on project governance requirements and project delivery organizational design; prepare integrated plans for project oversight, decision-making, and change management.
- Lead and coordinate risk management planning and implementation; prepare and manage risk registers and issues logs; prepare for and facilitate comprehensive risk reviews and workshops.
- Review of design documents for value engineering; advise on value engineering strategies; facilitate and/or participate in value engineering workshops.
- Capital cost estimation, including Independent Cost Estimate services.
- Operating cost estimation, for fixed facilities and transit operations.
- Provide real estate and right-of-way (ROW) advisory and management services; prepare Real Estate Acquisition Management Plans and/or review such plans prepared by others; review and advise on specific ROW issues and strategies.

Areas of expertise include:

- 3.1 Funding Strategy and Funding Plan Development
- 3.2 Project Financial Analysis and Modeling
- 3.3 Feasibility, Constructability, and Construction Sequencing
- 3.4 Project Delivery Methods and Evaluation
- 3.5 Risk Analysis and Risk Management
- 3.6 Cost Estimation
- 3.7 Value Engineering
- 3.8 Real Estate and Right of Way Management Services

#### **TASK 4 - Engineering and Technical Services**

The purpose of Task 4 is to provide a range of engineering and technical services required by the Transportation Authority. Services in the involved disciplines will include direct support/deliverables for Transportation Authority-led projects as well as review of work prepared by other agencies.

Specific Engineering and Technical Services include:

- Traffic and transit operations analysis including systems and network modeling
- Environmental studies and environmental review preparation
- Other environmental activities, including evaluation reports and permitting documents
- Preliminary engineering and design documents for local roadway, state highway, and transit projects
- Geometric designs for transit and roadway infrastructure
- Intelligent Transportation Systems and tolling strategies
- Ferry planning, operations, and engineering
- Rail planning, development, and delivery, including:
  - Rail project planning, including for new and infill stations, station upgrades, extensions, grade separations, and new fixed alignments at/above- and below-grade

- Rail project design for light rail, conventional gauge, and wide-gauge systems, including track geometric design, subway tunnel design, and at/above- and below-grade stations
- Rail facilities planning and design, including maintenance and storage facilities
- Rail systems planning and design, including core systems, supporting systems, and systems integration
- Rail system operations planning and analysis, including sketch-level and simulation-level modeling
- Rail system renewal planning and design, including legacy asset/systems assessment, state-of-good-repair program development, and asset management
- Building design and engineering for transportation facilities and related infrastructure improvements
- Geotechnical evaluation, ground exploration, and testing for tunneling and subsurface structures
- Existing site conditions documentation including surveying and utility mapping

Areas of expertise include:

- 4.1 Civil Engineering
- 4.2 Structural Engineering
- 4.3 Traffic Engineering
- 4.4 Utility Engineering and Agreements
- 4.5 Geotechnical Engineering
  - 4.5.1 Tunnel and Underground Engineering
  - 4.5.2 Geotechnical Analysis and Evaluations
- 4.6 Rail Operations Analysis and Planning
- 4.7 Rail Systems Engineering
- 4.8 Rail State of Good Repair Program Development
- 4.9 Intelligent Transportation Systems and Technologies
- 4.10 Tolling Systems Integration and Commissioning
- 4.11 Ferry Service Planning, Engineering, Operations
- 4.12 Environmental Review Development, Permitting, Impact Evaluation, Clearance, and Compliance
- 4.13 Architecture and Landscape Architecture
- 4.14 Surveying and mapping

## **General Administration**

Contractor will also perform the following general project administrative duties:

- a) Prepare a monthly summary of total consultant service charges made to each task. This summary shall present the contract budget for each task, any re-allocated budget amounts, the prior billing amount, the current billing, total billed to date, and a total percent billed to date. Also for each task, prepare an estimate of budget needed to complete the task and compare this amount to the original and modified budget, funding and percent of scope completed to track project effectiveness. Narratives will contain a brief analysis of budget-to-actual expenditure variances, highlighting any items of potential concern for Transportation Authority consideration before an item becomes a funding issue.
- b) Provide a summary table in the format determined by the Transportation Authority indicating the amount of Disadvantaged Business Enterprise (DBE), Small Business Enterprise (SBE), and Local Business Enterprise (LBE) firm participation each month based upon current billing and total billed to date. Include the actual invoiced to-date and paid to-date figures and compare them to the original budget in the task order to track performance against DBE/SBE/LBE goals.

- c) Provide a monthly invoice in the standard format determined by the Transportation Authority that will present charges by task, by staff members at agreed-upon hourly rates, with summary expense charges and sub-consultant charges. Detailed support documentation for all consultant direct expenses and sub-consultant charges will be attached.

Contractor shall demonstrate the availability of qualified personnel to perform general engineering and contract administration. All reports, calculations, measurements, test data and other documentation shall be prepared on forms specified and/or consistent with either Caltrans or FTA standards.

**Attachment 2**  
**Shortlisted Respondents**  
**On-Call Project Management and Engineering Services**

No.	Prime Consultant	Areas of Expertise				Subconsultants
		Project Management and Project Controls	Project Oversight and Monitoring	Project Development and Delivery Support Services	Engineering and Technical Services	
1	Access Planning Ltd.	X	X	X	X	Azad Engineering PC (DBE) * CPCS Transcom, Inc. InfraStrategies, LLC Jacobs Engineering Group, Inc. Leothacue Enterprises, Inc. (DBE) * LK Planning, LLC (DBE) * Rico Engineering & Construction SHA Analytics, LLC (DBE) * Sperry Capital Inc. Transportation Analytics (DBE) * Vicous, LLC (DBE) *
2	Alta Planning + Design, Inc.	X	X	X	X	CHS Consulting Group (DBE/SBE/LBE) Impact Sciences, Inc. (DBE/SBE) * Nelson\Nygaard Consulting Associates Parikh Consultants, Inc. (DBE/SBE) Sandis Civil Engineers Surveyors Planners T.Y. Lin International
3	Arup North America Ltd.	X	X	X	X	Azad Engineering PC (DBE) * BAE Urban Economics, Inc. (DBE/SBE) * Chaudhary & Associates, Inc. (DBE/SBE) IDS California (DBE) * Keish Environmental (DBE) * Laura Blake Architect (DBE/LBE) * Monument ROW, Inc. (DBE) * MSA Design & Consulting, Inc. (SBE/LBE) Pendergast Consulting Group, Inc (SBE) Peyser Associates, LLC SHA Analytics, LLC (DBE) * Terry Hayes & Associates, Inc. (DBE) T J K M (DBE) *
4	Brierley Associates		X	X	X	Divis Consulting, Inc. (LBE) * Dr. Mole, Inc. Monument ROW, Inc. (DBE/SBE) *

Abbreviations:

DBE: Disadvantaged Business Enterprise

SBE: Small Business Enterprise

LBE: Local Business Enterprise

\* New DBE/SBE/LBE subconsultant firms within the last 5 years.

No.	Prime Consultant	Areas of Expertise				Subconsultants
		Project Management and Project Controls	Project Oversight and Monitoring	Project Development and Delivery Support Services	Engineering and Technical Services	
5	Cole Management & Engineering, Inc.	X	X	X	X	Acumen Building Enterprises, Inc. (DBE/SBE/LBE) Advance Project Delivery, Inc. Associated Right-of-Way Services, Inc. (SBE) Fremier Enterprises, Inc. KL Bartlett Consulting (DBE/SBE) Lohman Project Consulting (SBE) OrgMetrics, LLC (SBE) Parisi Transportation Consulting (SBE) PDM Group, Inc. Pendergast Consulting Group, Inc. (SBE) Rattray Program Management, LLC (SBE) * Tricertus, LLC (DBE/SBE) * WMH Corporation (SBE) Zurinaga Associates (DBE/SBE/LBE)
6	Dabri, Inc. (DBE/SBE/LBE) *	X	X	X	X	Advanced Mobility Group (SBE) * BioMaAS, Inc. (DBE/SBE/LBE) * Community Design + Architecture (SBE) * COWI North America, Inc. Del Recharadson & Associates, Inc. (DBE/SBE) * Gannett Fleming, Inc. Jacobs Engineering Group, Inc. Maffei Structural Engineering (SBE/LBE) * Merrill Morris Partners (DBE/SBE) Monument ROW, Inc. (DBE/SBE) * Ninyo & Moore Geotechnical & Environmental Sciences Consultants Telamon Engineering Consultants, Inc. (DBE/SBE/LBE) *
7	Gall Zeidler Consultants, LLC	X	X	X	X	C2PM (DBE/SBE) * WMH Corporation (SBE)
8	HNTB Corporation	X	X	X	X	Bess Testlab, Inc. (DBE/SBE) * Bluebird Advisors, LLC (DBE) * Haygood & Associates Landscape Architects (DBE/SBE/LBE) Intueor Consulting, Inc. (DBE/SBE) KL Bartlett Consulting (DBE/SBE) KPFF, Inc. Monument ROW, Inc. (DBE/SBE) * Parikh Consultants, Inc. (DBE/SBE) Procura 360 Group, LLC (DBE/SBE) * TransSIGHT LLC (DBE/SBE)

Abbreviations:

DBE: Disadvantaged Business Enterprise

SBE: Small Business Enterprise

LBE: Local Business Enterprise

\* New DBE/SBE/LBE subconsultant firms within the last 5 years.

No.	Prime Consultant	Areas of Expertise				Subconsultants
		Project Management and Project Controls	Project Oversight and Monitoring	Project Development and Delivery Support Services	Engineering and Technical Services	
9	Mark Thomas & Company	X	X	X	X	Associated Right-of-Way Services, Inc. (SBE) CHS Consulting Inc. (SBE/LBE) Environmental Science Associates Geocad, Inc. (DBE/SBE) * HydroConsult Engineers, Inc. (DBE/LBE) * Kittelson & Associates, Inc. Merill Morris Partners (DBE/SBE/LBE) Monument ROW Inc. (DBE) * OPAC Consulting Engineers, Inc. (DBE/SBE) * Parikh Consultants, Inc. (DBE/SBE) Parisi Transportation Consulting (SBE) Procura 360 Group LLC (DBE/SBE) * ROMA Collaboration (DBE/SBE/LBE) * Urban Design Consulting Engineers Y&C Transportation Consultants, Inc. (DBE/SBE)
10	McMillen Jacobs Associates	X	X	X	X	CHS Consulting, Inc. (DBE/SBE) Freyer & Laureta, Inc. (SBE/LBE) * ICF Jones & Stokes, Inc. MSA Design & Consulting Inc. (SBE/LBE) Slate Geotechnical Consultants, Inc. (SBE) * VIA Architects Inc. (Perkins Eastman Architects)
11	Mott MacDonald Group, Inc.	X	X	X	X	Associated Right-of-Way Services, Inc. (SBE) AZAD Engineering PC (DBE/SBE/LBE) * Biggs Cardosa Associates, Inc. Chaudhary & Associates, Inc. (DBE/SBE) Circlepoint (SBE) Dabri, Inc. (DBE/SBE) * Ernst & Young Infrastructure Advisors, LLC Parisi Transportation Consulting (SBE) ROMA Collaboration (DBE/SBE/LBE) * Silicon Transportation Consultants LLC (DBE/SBE) Strategic Value Solutions, Inc.
12	Parisi Transportation Consulting (SBE)	X	X	X	X	Civic Edge Consulting, LLC (DBE/SBE/LBE) M Lee Corporation (DBE/SBE/LBE) Ronny Kraft Consulting (DBE/LBE) *

Abbreviations:

DBE: Disadvantaged Business Enterprise

SBE: Small Business Enterprise

LBE: Local Business Enterprise

\* New DBE/SBE/LBE subconsultant firms within the last 5 years.

No.	Prime Consultant	Areas of Expertise				Subconsultants
		Project Management and Project Controls	Project Oversight and Monitoring	Project Development and Delivery Support Services	Engineering and Technical Services	
13	Parsons Transportation Group, Inc.	X	X	X	X	Associated Right-of-Way Services, Inc. (SBE) Earth Mechanics, Inc. (DBE/SBE) FMG Architects (DBE/SBE/LBE) GPA Consulting (DBE/SBE) * Guida Surveying, Inc. (SBE) * JMA Civil, Inc. Jacobs Engineering Group Inc. Kal Krishnan Consulting Services, Inc. (DBE/SBE) * Merrill Morris Partners (DBE/SBE/LBE) Saylor Consulting Group (DBE/SBE/LBE) *
14	PGH Wong Engineering, Inc.	X	X	X	X	CHS Consulting, Inc. (SBE/LBE) Cornerstone Transportation Consulting, Inc. (DBE/SBE) * Merrill Morris Partners (DBE/SBE/LBE) Nelson\Nygaard Consulting Associates Parikh Consultants, Inc. (DBE/SBE) Robin Chiang & Company (DBE/LBE) * Saylor Consulting Group (DBE/SBE/LBE) * Telamon Engineering Consultants, Inc. (DBE/SBE/LBE) *
15	TY Lin International	X	X	X	X	Aliquot Associates, Inc. (DBE) * Alta Planning + Design, Inc. CHS Consulting, Inc. (DBE/SBE/LBE) Cole Management & Engineering, Inc. Colmena Engineering E-Squared Consulting Corporation Iteris, Inc. MarshWagner, Inc. Monument ROW, Inc. (DBE) * Nelson\Nygaard Consulting Associates Parikh Consultants, Inc. (DBE) Procura 360 Group, LLC (DBE/SBE) * Rincon Consultants, Inc. Robin Chiang & Company (DBE/LBE) * Transit Systems Engineering, Inc.

Abbreviations:

DBE: Disadvantaged Business Enterprise

SBE: Small Business Enterprise

LBE: Local Business Enterprise

\* New DBE/SBE/LBE subconsultant firms within the last 5 years.



No.	Prime Consultant	Areas of Expertise				Subconsultants
		Project Management and Project Controls	Project Oversight and Monitoring	Project Development and Delivery Support Services	Engineering and Technical Services	
16	WMH Corporation (SBE)	X	X	X	X	ABA Global, Inc. (DBE) * Associated Right-of-Way Services, Inc. (SBE) Biggs Cardosa Associates, Inc. Cole Management and Engineering, Inc. David J. Powers & Associates, Inc. (DBE/SBE) Geocon Consultants, Inc. Haygood & Associates Landscape Architect (DBE/SBE) HDR Engineering, Inc.   Wreco JMA Civil, Inc. Kimley-Horn & Associates, Inc. Parikh Consultants, Inc. (DBE/SBE) Towill, Inc. (SBE) Y&C Transportation Consultants, Inc. (DBE/SBE)
17	WSP USA, Inc.	X	X	X	X	Circlepoint (SBE) Elite Transportation Group, Inc. (DBE) * Freyer & Laureta, Inc. (DBE/SBE/LBE) * M Lee Corporation (DBE/SBE/LBE) Merrill Morris Partners (DBE/SBE/LBE) Motive Power, Inc. (SBE) * Panorama Environmental, Inc. (DBE/LBE) * Robin Chiang & Company (DBE/LBE) * Silicon Transportation Consultants LLC (DBE/SBE) SPS Engineers (DBE) * William R. Gray and Company, Inc. (SBE) *
<b>Total Firms Shortlisted by Areas of Expertise</b>		<b>15</b>	<b>16</b>	<b>16</b>	<b>16</b>	

Abbreviations:

DBE: Disadvantaged Business Enterprise

SBE: Small Business Enterprise

LBE: Local Business Enterprise

\* New DBE/SBE/LBE subconsultant firms within the last 5 years.

**Attachment 3**  
**On-call Project Management Oversight and General Engineering**  
**Assigned Task Orders from 2017 to 2022**

<b>Prime Consultant<sup>1</sup></b>	<b>Task Order Description</b>	<b>Total Task Order Amount</b>	<b>Subconsultants</b>	<b>Amount to Subconsultants</b>
<b>AECOM</b>	Downtown Extension Project Delivery Review	\$26,633		
<b>Associated Right of Way Services, Inc. (SBE)</b>	19 <sup>th</sup> Avenue Combined City Project	\$55,373		
	Lombard Street Corridor	\$6,719		
	Downtown Extension	\$75,000		
<b>Brierley Associates Corporation</b>	Downtown Extension	\$112,657	Doctor Mole, Inc.	\$49,083
			Alta Engineering Group, Inc. (DBE,LBE,SBE)	\$5,287
	Pennsylvania Avenue Extension Pre-environmental Study	\$75,000	Doctor Mole, Inc.	\$17,520
<b>Fehr &amp; Peers (LBE)</b>	Freeway Corridor Management Study	\$134,825	Emergent Transportation Concepts, LLC (DBE,SBE)	\$62,099
<b>HDR Engineering, Inc. (LBE)</b>	Yerba Buena Island West-Side Bridges	\$299,945	KL Bartlett Consulting (DBE,SBE)	\$15,200
<b>HNTB Corporation (LBE)</b>	Treasure Island Mobility Management Agency Program	\$1,998,012	FRFS Consulting	\$320,030
			KL Bartlett Consulting (DBE,SBE)	\$112,490
			TollPoint LLC (DBE)	\$108,420
			Circlepoint (SBE)	\$105,865

<sup>1</sup> The following firms were shortlisted under the on-call transportation project management oversight and general engineering contract but did not have executed task orders to date: Biggs Cardosa Associates, Inc.; Cardno, Inc.; Ernst & Young Infrastructure Advisors; Gannett Fleming, Inc. (formerly Traffic Technologies Inc.); Kimley-Horn; Kittelson & Associates, Inc.; McMillen Jacobs Associates; MNS Engineers, Inc.; Overland, Pacific, & Cutler, Inc.; Rajappan & Meyer Consulting Engineers, Inc.; Silicon Transportation Consultants; Sperry Capital, Inc.; and Stantec Consulting Services, Inc.

<b>Prime Consultant<sup>1</sup></b>	<b>Task Order Description</b>	<b>Total Task Order Amount</b>	<b>Subconsultants</b>	<b>Amount to Subconsultants</b>
			TransSight LLC (DBE,LBE,SBE)	\$59,650
			Intueor Consulting, Inc. (DBE,SBE)	\$51,762
			HT Harvey & Associates	\$12,000
	19 <sup>th</sup> Avenue Combined City Project	\$24,793		
	Lombard Street Corridor	\$13,990		
<b>IDS California (DBE)</b>	Downtown Extension Project Delivery Review	\$128,216	Arup N. America (LBE)	\$34,580
			Nossaman LLP (LBE)	\$53,476
			Permut Consult	\$8,000
<b>Mott MacDonald, LLC</b>	ConnectSF Streets and Freeways Study	\$106,974		
	Kearny Street Multimodal Implementation Plan Traffic Analysis	\$5,223		
<b>Parisi Transportation Consulting (SBE)</b>	District 9 Freeway Study	\$159,275		
	Yerba Buena Island/Treasure Island Multiuse Pathway and Transportation Analysis	\$240,474		
	I-280 Northbound Geneva Avenue Off-Ramp Modification Feasibility Study	\$150,000	Parikh Consultants (DBE)	\$7,500
			Amy Skewes-Cox (DBE)	\$7,500
<b>Parsons Transportation Group (LBE)</b>	Van Ness Bus Rapid Transit Project	\$167,929		
<b>SENER Engineering and Systems, Inc.</b>	Downtown Extension Project Delivery Review	\$32,641		
<b>T.Y. Lin International</b>	Downtown Extension	\$257,104		

<b>Prime Consultant<sup>1</sup></b>	<b>Task Order Description</b>	<b>Total Task Order Amount</b>	<b>Subconsultants</b>	<b>Amount to Subconsultants</b>
	San Francisco Municipal Transportation Agency's Siemens Light Rail Vehicle Repairs	\$217,247		
<b>WMH Corporation (SBE)</b>	US 101/I-280 Managed Lanes Project	\$1,046,870	Associated Right of Way Services, Inc. (SBE)	\$2,708
			Circlepoint (SBE)	\$73,740
			Emergent Transportation Concepts, LLC (DBE,SBE)	\$99,750
			Fehr & Peers (LBE)	\$250,631
			Gray-Bowen-Scott (SBE)	\$8,718
			HNTB Corporation (LBE)	\$17,324
			MGE Engineering, Inc. (DBE,SBE)	\$15,914
			Rail Surveyors and Engineers, Inc. (DBE, SBE)	\$37,005
			WRECO (DBE,SBE)	\$24,229
<b>WSP USA, Inc. (LBE)</b>	Lombard Crooked Street Reservations and Pricing Study	\$56,243	CHS Consulting Group (DBE,LBE,SBE)	\$13,130
	Downtown Extension Project Delivery Review	\$297,478	McKinsey & Company	\$100,000
	Treasure Island Mobility Management Agency Program	\$141,406	Silicon Transportation Consultants (DBE)	\$29,712
	Southgate Road Realignment Project	\$45,735		
<b>Zurinaga Associates (DBE)</b>	Yerba Buena Island Ramps, Bridge Structures and Southgate Road Realignment Projects	\$3,994,861	Cole Management & Engineering, Inc.	\$114,999
			KL Bartlett Consulting (DBE,SBE)	\$280,649
			Lohman Project Consulting	\$232,340

<b>Prime Consultant<sup>1</sup></b>	<b>Task Order Description</b>	<b>Total Task Order Amount</b>	<b>Subconsultants</b>	<b>Amount to Subconsultants</b>
			PDM Group, Inc. (DBE)	\$3,172,643
			Pendergast Consulting Group (DBE,SBE)	\$85,418
	Project Management Oversight	\$2,745,771	KL Bartlett Consulting (DBE,SBE)	\$110,094
	Downtown Extension	\$254,833	KL Bartlett Consulting (DBE,SBE)	\$2,972
	Treasure Island Mobility Management Agency Program	\$8,046	KL Bartlett Consulting (DBE,SBE)	\$227
			Pendergast Consulting Group (DBE,SBE)	\$7,558
	US 101/I-280 Managed Lanes Project	\$13,298	PDM Group, Inc. (DBE)	\$12,922
	ConnectSF Streets and Freeways Study	\$6,966	PDM Group, Inc. (DBE)	\$6,769
<b>Total Task Orders Awarded to Date</b>		<b>\$12,899,537</b>		
<b>Total Task Orders Allocated to Subconsultants (44%)</b>				<b>\$5,729,914</b>
<b>Total Task Orders Awarded to Disadvantaged Business Enterprise Firms (48%)</b>				<b>\$6,127,630</b>
<b>Total Task Orders Awarded Local Business Enterprise Firms (18%)</b>				<b>\$2,299,108</b>
<b>Total Task Orders Awarded to Small Business Enterprise Firms (31%)</b>				<b>\$3,971,135</b>
<b>Total Contract Amount</b>				<b>\$16,500,000</b>