

Downtown Rail Extension (DTX) / The Portal Project

Procurement Approach

Citizen Advisory Committee
July 11, 2023



The Process

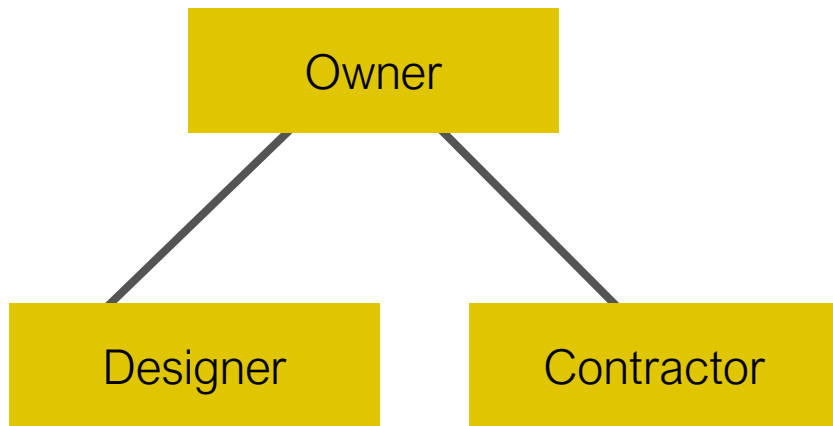


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Contract Model Plan – framework for contracts; recommendations on how to address select elements

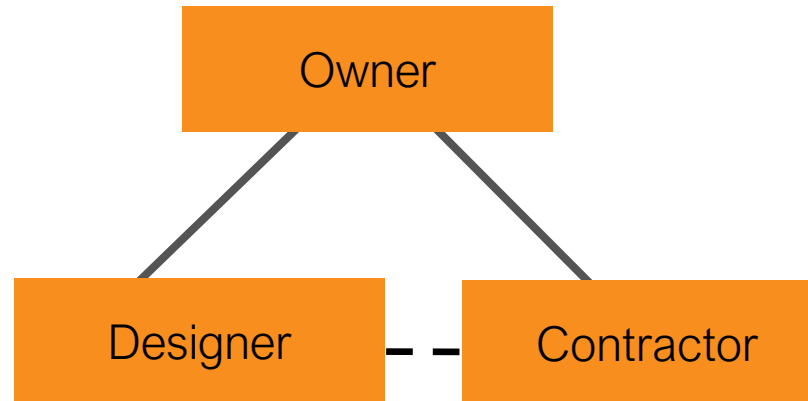
Adopted Delivery Method

Design-Bid-Build



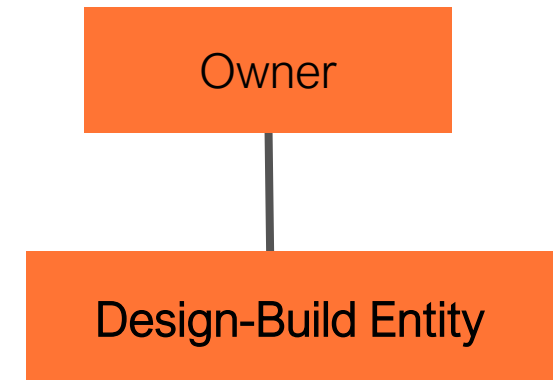
Early Works¹

Construction Manager/
General Contractor



Track and Systems
Station Fit Out

Progressive Design-Build



Tunnel/Heavy Civil

¹ Caltrain railyard trackwork modifications may use different delivery method

Procurement Objectives

- Market interest and competition
- Delivery agency
- Risk
- Value
- Flexibility and adaptability
- Schedule
- Transparent Procurement process
- Small Business Opportunity
- Safety
- Quality

Comparative Projects

PROJECT	Los Angeles County Metropolitan Transportation Authority East San Fernando Valley Light Rail	Santa Clara Valley Transportation Authority BART Silicon Valley Extension Program Phase II	Metrolinx Scarborough Subway Extension	San Francisco Municipal Transportation Agency Central Subway	San Francisco Public Utilities Commission City Distribution Division Campus	Caltrain Mountain View Transit Center Grade Separation	Sound Transit University Link Light Rail Systems
CONTRACT TYPE	PDB	PDB	PDB	DB	CMGC	CMGC	CMGC

Concepts Reviewed

1. Procurement Process
2. Evaluation Criteria and Weighting
3. Contract Negotiation and Award
4. Approval to Advertise and Award
5. Conflict of Interest
6. Procurement Schedule
7. DBE Approach
8. Approach to Fair and Transparent Selection

Procurement Process Approach

Two-Step

- Request for Qualifications
- Request for Proposals

Evaluation Criteria

Step	Elements
Step 1 – Qualifications	Statement of Qualifications
Step 2 – Proposals	Technical Proposal
	Interview
	Price Proposal

- Evaluation will be primarily based on Qualifications, Technical Proposal, and Interview
- Scores from Step 1 will be added to scores from Step 2
- Contents of Price Proposal to be determined but could include overhead/margins

Evaluation Criteria

Step	Element	Suggested Items to be Evaluated
Step 1 – Qualifications	Statement of Qualifications	History and experience of firms
		Qualifications of Key Personnel
		Project approach for preconstruction
		Small/Disadvantaged Business Enterprise Commitment
		Financial, bonding capacity, claims history

Evaluation Criteria

Step	Element	Suggested Items to be Evaluated
Step 2 – Proposal	Technical Proposal	Design Management Plan (for PDB)
		Systems Integration Plan (for CMGC Track and Systems)
		Coordinated Installation Plan (for CMGC Station Finishes)
		Construction Management Plan
		Risk Management Strategies
		Approach to subcontract packaging and procurement
	Creative ideas to optimize project schedule	
	Interview	Presentation
		Responses to questions
		Collaboration and team dynamics
Price Proposal	TBD	

Procurement Schedule

- PDB – Tunnel and Heavy Civil
 - RFQ = Winter 2023
 - RFP = Spring 2024
- CMGC – Track and Systems (schedule under review)
 - RFQ ~ Spring 2024
 - RFP ~ Summer 2024
- CMGC – Station Fit out and Mechanical/Electrical/Plumbing (schedule under review)
 - RFQ ~ Winter 2024
 - RFP ~ Spring 2024

Next Steps



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Development of Procurement and Contract Documents – working group started to develop the details

Questions?

