



CUY IR 490/SR 010 02.09/19.28
PID 96833
PROJECT# (17)3000

SOQ Executive Scoring Summary and Highlights

September 23, 2016

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Technical SOQ Evaluation

Background:

The CUY IR 490/SR 010 02.09/19.28, PID 96833, ODOT Project # 3000(17), is for the design and construction of Section 3 of the Opportunity Corridor Project (informally referred to as OC3). It will be the third major project constructed from CUY-Opportunity Corridor (PID 77333) planning efforts. OC3 involves the construction of a new roadway in the City of Cleveland from I-490 near E. 55th Street to E. 93rd Street, where it ties into to Section 2. The project will reconstruct portions of several local streets and the east end of I-490, construct five new bridges and reconstruct one bridge, and demolish buildings. The anticipated completion date for the project is June 30, 2021.

ODOT is using a Value-Based Design-Build procurement process to select a design-build contractor to deliver this Project. ODOT initiated the process with the release of a Request for Qualifications on July 27, 2016. Interested Offerors were required to provide ODOT with a list of qualifications including past experience, project understanding and approach and capabilities of the team in the format outlined in the RFQ. Short-listed Offerors are to be the three most highly qualified Offerors that submitted SOQs. In the second phase, ODOT will issue the Project Proposal and Scope of Services (the “RFP”) for the Project to the short-listed Offerors. Only the short-listed Offerors will be eligible to submit bids for the Project.

Statements of Qualifications (SOQs) were received from 4 Offerors on August 30, 2016 by the required Noon deadline from the following:

OFFEROR	DESIGN BUILD CONTRACTOR	DESIGN BUILD DESIGNER	INDEPENDENT QUALITY FIRM	DIVERSITY AND INCLUSION CONSULTANT
Walsh Construction	Walsh Construction	Parsons Transportation	American Structurepoint	G. Stephens Inc.
Kokosing	Kokosing	Michael Baker	Richland Engineering	Brownstone Grey
TGR Joint Venture	Trumbull Great Lakes Construction Ruhlin	HDR Engineering	TranSystems	Integral Management
LANE Construction	LANE Construction	ms consultants	WSP – Parsons Brinckerhoff	Adrian Maldonado and Associates

The SOQs were checked-in to verify general formatting and general responsiveness. All submitted SOQs met the general formatting requirements and were thereby accepted as being eligible for review.

This document is a summary of the evaluation performed by the Technical SOQ Evaluation Team. This is only a highlighted summary of the overall TET evaluation notes.

Evaluation Process:

A project specific SOQ Evaluation Manual was established and reviewed by the TET prior to receiving the SOQs from interested Offerors. This manual is to ensure the impartial, equitable and comprehensive evaluation of each Offeror’s SOQ in accordance with the Design Build Project’s RFQ. This document provided the general methodology and procedures for evaluation of the SOQs. Per the manual, the Technical level team was to rate and rank the SOQs to shortlist the 3 highest ranked responsive submittals.

The members of the Technical Level Evaluation Team were:

Gary Benesh	District 12 Planning and Engineering Project Manager
Terry Bolden	Central Office of Outreach Administrator
James Calanni	District 12 Bridge Engineer
Maria Davila	District 12 EEO Regional Program Administrator
Lou Hazapis	District 12 Planning & Engineering Administrator
Eric Kahlig	Central Office Division of Construction Management
Greg Kronstain	District 12 Construction Administrator
Julie Meyer	District 12 Construction Area Engineer
Randy Over	District 12 Construction
Tom Pannett	Central Office Contract Sale Administrator

Eric Kahlig served as the Evaluation Chair. The intent of the ranking of the SOQ only determines shortlisted Offerors. The rankings do not carry through into the Technical Proposal scoring.

“GENERAL

Based on the recommendations of the Evaluation Team, the Department will short list no more than three (3) Offerors based on the evaluation criteria found in Section 2.2.”

“RIGHTS OF THE DEPARTMENT

The Department reserves the right to reject any and all SOQs.

The Department reserves the right to cancel, withdraw, postpone, modify, revise or extend an RFQ in whole or in part at any time prior to the execution by the Department of the Design-Build Contract, without incurring any obligations or liabilities....

Minimum Pass/Fail requirements are listed in Appendix A but the Department reserves the right to deem a SOQ non-responsive if found to be materially deficient, as judged by the Department, failing to depict a competent DBT.”

Although all SOQs were technically responsive, all SOQs were fully reviewed. Per RFQ section 1.3, the Department reserved the right to deem any SOQ non-responsive if found materially deficient. Per RFQ section 3.1, commitments made within the SOQ can be considered contractual if they are found to bring benefit to the project. The SOQ evaluation and discussions centered on documenting noted commitments and determining general competence.

“1.3 RIGHTS OF THE DEPARTMENT

... Minimum Pass/Fail requirements are listed in Appendix A but the Department reserves the right to deem a SOQ non-responsive if found to be materially deficient, as judged by the Department, failing to depict a competent DBT.”

“3.1 Technical Proposal and Bid Preparation

“...Commitments made in the SOQ which can reasonably be interpreted as offers to provide higher quality items or additional services shall be incorporated by reference into the awarded DBT’s contract requirements.”

The members of the Technical SOQ Evaluation Team (TET) independently reviewed each Offeror’s SOQ. Upon completion of these independent reviews, the TET met to discuss the SOQs to determine any perceived commitments within the RFQ and to document notable items found within the RFQ. Consensus agreement of perceived strengths and comments was required. The TET conferred on September 15, 2016 and September 16, 2016 and September 21, 2016.

CONFIDENTIAL

General Summary of Statement of Qualifications Received

General Evaluation Observations:

These general comments are opinions of the Evaluation Chair based upon discussions and ratings performed by the entire Technical Evaluation Team.

Overall, all four SOQ submittal's quality, organization, and format were good to excellent, with some minor concerns noted. All were very easily followed, responded to requested information, and followed the Request for Qualifications formatting. All teams demonstrated competence in being able to complete the project.

Walsh: The Evaluators agreed that this SOQ showed a general understanding of the project. The projects mostly relayed experience relevant to the project. The Key Personnel have experience that shows the capability to design and build this project. The firms presented in the SOQ have the capacity to meet the commitments and requirements of the project. The Diversity & Inclusion Outreach consultant overly stated involvement in noted projects. Of the three risk items identified, one did not indicate a strong understanding of the challenges associated with this project (MOT). The methods described in the Diversity and Inclusion narrative show a reasonable approach based on their business practices.

Kokosing: The Evaluators' consensus was this SOQ was notably better than the other submittals. Commitments made were reasonable and achievable. Past known performances on projects and reference checks assures the TET that statements and commitments will be met. The DBT's Key Design and Construction personnel were good with good experiences. The lead IQF Manager is an excellent candidate for the role. The Diversity and Inclusion manager is a good candidate. The commitments and overall approach to Diversity and Inclusion was good to excellent with many good and innovative project specific ideas and proposals.

TGR: The Evaluators agreed that this SOQ showed a general understanding of the project. The Evaluators were satisfied with the approach and commitments presented in this SOQ. The approach, DBT, and capabilities were better than most other proposals. Their past projects and Key Personnel show positive experiences and capability across the three members of the joint venture. The Diversity and Inclusion narrative committed to more specific efforts than other SOQs, with the caveat that a joint venture member has not fully met similar commitments on OC2.

LANE: While the SOQ presents an approach to the project that has merits, the Evaluators' consensus was that it showed an understanding of the project that was weaker than the other Offerors. One of the top three risk items did not show a strong understanding of the challenges associated with the project (MOT). The firms in the DBT had strong national experience and capabilities, but did present experiences as relevant to this Project when compared to others. The experience of some Key Personnel also did not show similar roles on projects of similar scope. The Diversity and Inclusion approach described some unique past efforts on a national level, the Diversity and Inclusion consultant does have a regional presence, but did not show familiarity with the needs of the project area neighborhoods.

Overall RFQ Evaluation Topics

The RFQ informed Offerors of the structure for SOQs, as well as the points for each of the four major sections. Offerors could choose how many pages to allocate for each section, up to 20 pages total. Note that the maximum rating was 110 points.

Topic	Evaluation Criteria	Maximum Points
Project Understanding and Approach	How well does the Offeror demonstrate a preliminary understanding of the risks, design and construction requirements of the project?	30
Design-Build Project Team	How well do the Offeror’s qualifications, experience and time availability relate to the requirements of the project?	35
Capabilities and Experience	How well does the Offeror demonstrate their design, construction and management experience for this project?	15
Diversity and Inclusion	How well does the Offeror demonstrate their ability to ensure a diverse workforce representative of the local community, small business inclusion, and demonstrate an intent to ensure a comprehensive diversity outreach program?	30
Total		110

RFQ Scoring Topic: Project Understanding and Approach

Basis of Evaluation for Project Understanding and Approach:

The TET evaluated the Offerors on how well the Offeror’s demonstrated a preliminary understanding of the design and construction requirements of the project by considering how well the Offeror addressed the following:

1. Evaluate the general approach to the project. Specifically evaluate the Offeror’s anticipated general approach to managing risk specific to the Project during procurement and after Award, evaluate how the Offeror will monitor the quality of the Work to ensure high quality for the duration of the Project and evaluate the Offeror’s anticipated approach to ensuring timely initiation of design and physical project construction.
2. Evaluate the description of the three (3) most significant tasks involved with the Project as identified by the Offeror, the potential risks associated with the identified major tasks, planned methods to mitigate those risks.

The TET identified the following highlights in the DBTs' project understanding and approach.

Walsh:

Strength: 3

Minor Strength: 4

Minor Weakness: 3

Weakness: 1

1. Offeror demonstrated reasonable approach and understanding of the project.

Highlighted strengths/commitments:

- Good emphasis on need for Diversity & Inclusion
- Risk Management Plan to manage risk

Noted potential concerns:

- General concern with DB Project Manager directing D&I efforts
- Previous District experience has noted some issues with statement that quality is a higher priority than schedule, as schedule has overridden this statement

2. Demonstrated an acceptable understanding of the major tasks and risks, except identifying MOT as a major task in the opinion of the Reviewers. Their three major tasks identified were (1) 3rd Party Coordination, (2) Norfolk Southern (NS) Bridge Impact, and (3) Maintenance of Traffic (MOT).

Highlighted strengths/commitments:

- A utility task force will be established to update and maintain the Utility Matrix and to directly work with utilities.
- Buildable Units will be configured around problem areas.
- Identified Phase 2 environmental issues after ROW acquisition as a Potential Risk.
- Early delivery of critical bridge components
- Team demonstrated knowledge and ability of working with local railroads and GCRTA on previous projects.

Noted potential concerns:

- Naming MOT as major risk is a questionable approach to the project.
- The statement "The railroads are directly affected by four of the six new bridges to be build and the bridge to be removed...." Shows the Offeror may have combined and considered NS and GCRTA as one entity.

Kokosing:

Strength: 3

Minor Strength: 8

Minor Weakness: 1

Weakness: 0

1. Offeror provides good to very good general approach to project with project appropriate specific details.

Highlighted strengths/commitments:

- Already initiated OC3 specific diversity outreach (verified)
 - Will develop and maintain risk matrix, organized by discipline and geography
 - Each scope section will be assigned pre-award to both an estimator and designer
 - Pre-bid design deliverables will be prioritized to allow sufficient contractor bidding periods for increased diversity opportunities. This demonstrates understanding of timing needed for DB issues with NSLE firms and goals.
 - Design packages will be sequenced to facilitate third-party reviews, utility relocations, diversity and inclusion outreach, and workforce development.
 - The design team will share weekly status plan sets and live basemaps via Projectwise with the IQF and ODOT QA staff to ensure Quality Control.
 - Design IQF from Richland Engineering performed similar role on Columbus Crossroads DB project.
 - The IQF will attend Design Task Force meetings and perform over-the-shoulder reviews.
 - Diversity & Inclusion Program will be implemented immediately
2. Demonstrated a good understanding of the major task and risks. Their three major tasks identified were (1) OC Blvd. under E. 55th, (2) Schedule Management, and (3) Structures. Overall appropriate risks but the “Structures” risk was overly broad even though appropriate.

Highlighted strengths/commitments:

- Design and IQF review sequence will be developed in logical buildable units to expedite early construction packages and those with long review times (railroads and third-party utilities).
- Look to implement straight girders and eliminate complex bridge elements to mitigate fabrication and erection risks.

Noted potential concerns:

- IQF from Richland Engineering on Columbus Crossroads stated typical review turnaround of 2-3 days, besting the 5-day commitment. There is a minor concern of compromising quality to meet schedule, in the opinion of the reviewers.

TGR:

Strength: 1

Minor Strength: 6

Minor Weakness: 1

Weakness: 0

1. Offeror demonstrated a reasonable understanding, with sufficient project specific details.

Highlighted strengths/commitments:

- Previous experience of team operating as one company on CCG2
- The IQF will perform over-the-shoulder reviews.
- Use of task force meetings and OTS reviews to mitigate delay risk on schedule-sensitive project elements
- An understanding of project specific issues was demonstrated.

Noted potential concerns:

- “A strong public outreach component will be incorporated in our post award approach to ensure our team is aware of public concerns”. The preference would be for the DBT to understand public concerns prior to the award of the project.

2. Demonstrated a very good understanding of the major tasks and risks. Their three major tasks identified were (1) City Utility, and Rail Coordination, (2) East 55th Street Grade Separation and Surrounding Area, and (3) Norfolk Southern Grade Separation and Track Work.

Highlighted strengths/commitments:

- Risks identified by the Offeror demonstrate a good to very good understanding of project issues with specifics identified.
- Early utility task force and one-on-one meetings held after award.
- Team has demonstrated knowledge and ability to work with local railroad and GCRTA on a previous project.

LANE:

Strength: 0

Minor Strength: 2

Minor Weakness: 0

Weakness: 1

1. Demonstrated an understanding, but limited on project specific details.

Highlighted strengths/commitments:

- Good understanding of project-specific goals, with a focus on diversity.

2. Demonstrated an acceptable understanding of the major task and risks. Their three major tasks identified were (1) Maintenance of Traffic, (2) Utility Coordination and Construction, and (3) Railroad Construction and Coordination.

Highlighted strengths/commitments:

- Develop a design that avoids in-place utilities

Noted potential concerns:

- Naming MOT as a major risk is a questionable approach to the project
- GCRTA and railroad coordination is not a combined effort

RFQ Scoring Topic: Offeror’s Proposed Design-Build Project Team

Basis of Evaluation for the Offeror’s Project Team and Key Members:

The TET evaluated the Offeror’s Organization and Key Personnel in relation to the requirements of the Project by

- Evaluate the Offeror’s proposed organization by considering the organizational chart showing the “chain of command” of the anticipated roles proposed for the Offeror’s organization regarding the Project.
- Evaluate the experience of the firms that are part of the Offeror. Review the firms listed on Form B in light of their roles on the Offeror’s team.
- Evaluate the Key Personnel and the resumes shown in Part F (DB Project Manager, DB Design Project Manager, DB Construction Project Manager/Engineer, DB Diversity/Outreach Lead Manager, Design IQF Project Manager, DB Rail/Utilities/City Coordinator). Evaluate by considering how the Offeror’s description of the Key Personnel provides confidence to the Department that the Project and the Project risks will be effectively managed through personal competence, accountability, and relevant experience.

KEY PERSONNEL	DUTIES
DB Project Manager	Ultimately responsible for the Offeror’s performance. Ensures that personnel and other resources are made available. Responsible for contractual matters. The DB Project Manager shall be co-located on a full-time basis for the duration of the Project unless modification to the commitment is requested by the DBT and approved by ODOT in its sole discretion.
DB Design Project Manager	Actively manages the overall design of the project. Must be an employee of the Lead Designer. Responsible for overall design of the project inclusive of all structures and structural elements (bridge substructures and superstructures, retaining walls, noise walls) and roadway items (alignment, drainage, pavement, lighting, traffic signals, maintenance of traffic, etc.) Must be an Ohio P.E. at the time of Award. The DB Design Project Manager shall be co-located on a full-time basis for the duration of design activities unless modification to the commitment is requested by the DBT and approved by ODOT in its sole discretion.

Appendix A – Pass-Fail Requirements

<p>DB Construction Project Manager/Engineer</p>	<p>Actively manages the overall construction of the project. Must be an employee of the Lead Contractor. Responsible for overall construction inclusive of all structures and structural elements (bridge substructure and superstructure, retaining walls, noise walls) and roadway items (alignment, drainage, pavement, lighting, traffic signals, maintenance of traffic, etc). The DB Construction Project Manager/Engineer shall be co-located on a full-time basis for the duration of the Project unless modification to the commitment is requested by the DBT and approved by ODOT in its sole discretion.</p>
<p>DB Diversity/Outreach Lead Manager</p>	<p>Actively manages the project specific Diversity and Workforce Development program. Must be an employee of the Diversity, Inclusion & Outreach Consultant. Acts in conjunction with the Department, as the Project’s lead contact in regards to local community outreach efforts.</p>
<p>Design IQF Project Manager</p>	<p>Actively manages the Design Quality Assurance. Must be a member the IQF. Responsible for ensuring that the requirements of the Design Quality Management Plan are being met and to manage any other matters related to design quality. Must be an Ohio P.E. at the time of Award. The Design IQF Project Manager shall be co-located on a full-time basis for the duration of design activities unless modification to the commitment is requested by the DBT and approved by ODOT in its sole discretion.</p>
<p>DB Rail/Utilities/City Coordinator</p>	<p>Responsible for coordination with utilities, railroads, city/local representatives and other third parties with authority to make commitments on behalf of the DBT. Role may be held by more than one person. Must be an Ohio P.E. at the time of Award. The DB Rail/Utilities/City Coordinator shall be co-located on a full-time basis for the duration of the Project unless modification to the commitment is requested by the DBT and approved by ODOT in its sole discretion.</p>

Key personnel as defined were evaluated by considering:

- The individual’s position and authority within the Offeror.
- Previous projects, similar in nature to the proposed project (in regards to the DB Project Manager, DB Design Manager, DB Construction Project Manager/Engineer, Design IQF Project Manager, and DB Rail/Utilities Coordinator) or other significant efforts (in regards to the DB Diversity/Outreach Lead Manager) for which the individual has performed a similar function.
- Percentage of time that the individual will be dedicated to the Project during the following:
 - Design phase
 - Construction phase
- Relevant experience, professional registrations, education and other components of qualifications applicable to this project.

Appendix A – Pass-Fail Requirements

- Any unique qualifications.
- A statement indicating that the individual is currently employed by a member of the Offeror at the time of the SOQ submittal.
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Proposed Key Personnel Summary Table:

	Walsh	Kokosing	TGR	LANE
DB Project Manager	John Tracy	Jerry Hart	Adam Belasik	Troy Carter
DB Design Project Manager	Tom Gandolfi	Larry Ciborek	Ken Fertal	Jonathan Hren
DB Construction Project Manager/Engineer	Scott Febus	Brad Mast	Jason Tucker	Bill Hemaza
DB Diversity/Outreach Lead Manager	Halle Jones Capers	Wyatt Brownlee	June Taylor	Adrian Maldonado
Design IQF Project Manager	Dave Johansen	Dave Rinehart	Nabil Farah	Duane Phelps
DB Rail/Utilities/City Coordinator	Mark Hedrick	Jason Wise	Ryan Simon	Luke Baker (GCRTA, Utilities, and City) George Zimmerman (Norfolk Southern)

Discussion of Scoring Recommendations for the Offeror’s proposed Organization and Key Personnel:

Walsh:

- Strength: 2**
- Minor Strength: 4**
- Minor Weakness: 2**
- Weakness: 0**

1. Contractor names 26 specific people from 7 identified firms. Organizational chart depicting pertinent project roles with named persons.

Highlighted strengths/commitments:

- In addition to Key Personnel, Walsh commits:
 - Project Executive (Brad Koester, Walsh)

Appendix A – Pass-Fail Requirements

- Safety Manager (Jason Burroughs, Walsh)
- Construction Quality Manager (Luke Wilson, Walsh)
- Public Involvement Manager (David Bennett, DL Bennett)
- DB Diversity/Outreach Support (Phyllis Stevens, GSI and Brenda Wolf, Walsh)
- DB Coordinator (Jeff Lietzan, Walsh)
- Design Quality Manager (Tariq Masud, Parsons)
- Roadway Lead (Ken Wells, Parsons)
- Structural Lead (Robert Ballard, Parsons)
- Railroad Lead (Patrick Porzillo, Parsons)
- Utilities Lead (Dan Jozity, Arcadis)
- Drainage Lead (Phil Berdis, Arcadis)
- MOT Lead (Pat Gibbons, Parsons)
- Traffic Control Lead (Eric Tripi, Parsons)
- Geotechnical Lead (David Bird, SME)
- Aesthetics Lead (Craig Richardson, Parsons)
- Deputy Design Manager (Craig Hebebrand, Arcadis)
- Project Scheduler (Margaret Yanosko, Walsh)
- General Superintendent (Paul Bitters, Walsh)
- Project Controls Manager (Joe Wilson, Walsh)
- Showed a reporting relationship between the IQF and ODOT.

Noted potential concerns:

- Org chart did not show relationship shown between Design IQF Manager and Design/Design Quality Manager
- No relationship between DB Rail/Utilities /City Coordinator and Design

2. The Offeror is structured as a corporation.

Highlighted strengths/commitments:

- Walsh (Lead Contractor) has delivered 45 alternative delivery projects valued at over \$10B. ENR ranks them the #1 largest US bridge and #3 largest transportation contractor.
- Parsons (Lead Designer) has completed 106 DB/P3 projects worth \$35B. ENR ranks them as the #4 largest transportation firm.

3. Key Personnel

Highlighted strengths/commitments:

- DB Project Manager
 - Cleveland Innerbelt Bridge CCG1 DB (\$287M), DB Project Manager
 - Very Good recent relevant experience with ODOT (CCG1) on project of similar size, scope, and complexity in similar role. Recent and relative positive experiences and has proven to build positive relationships.
- DB Design Project Manager
 - Very good experience in role on projects of equal or more complexity. No regional experiences.
- DB Construction Project Manager

Appendix A – Pass-Fail Requirements

- Recent relevant experience with role in project of similar scope, size and complexity. Partnering skills could be improved, but relevant experience on recent projects.

Noted potential concerns:

- DB Diversity/Outreach Lead Manager
 - Limited experiences with role. Involvement in reference projects questionable.
- DB Rail/Utilities/City Coordinator
 - Past experiences have provided average results and recent experience noted on non-transportation.

Kokosing:

Strength: 3

Minor Strength: 5

Minor Weakness: 1

Weakness: 0

1. Contractor names 21 specific people from 8 identified firms. Organizational chart depicting pertinent project roles with named persons.

Highlighted strengths/Commitments:

- In addition to Key Personnel, Kokosing commits:
 - Regional Manager (Todd Lezon, Kokosing)
 - Workforce Development Consultant (Maurice Stevens, CDPS)
 - IQF Roadway Lead (Andy Wolpert, CH2M)
 - IQF Structures: Barry Neumann, Richland and Doug Stachler, Richland)
 - IQF Drainage Lead: Alysia Lorincz, CH2M)
 - Structures Lead (Chris Cummings, Baker)
 - Roadway Lead (Jason Watson, Baker)
 - Traffic Control/MOT Lead (Sean Milroy, Baker)
 - NS Structure Lead (Lisa Hoekenga, Baker)
 - Geotechnical Lead (Jamal Nusalrat, EL Robinson)
 - Drainage Lead (Kevin White, EL Robinson)
 - Corridor Aesthetics Lead (Craig Churchward, Baker)
 - Roadway/Utility Superintendent (Robin Eckeberry, IX)
 - Environmental Manager (Colleen Loreda, IX)
- The IQF is shown as a 'dotted line' report to ODOT and Kokosing, enforcing the concept of independence.

Noted potential concerns:

- Organizational chart did not show relationship shown between Design IQF Manager and Design/Design Quality Manager
2. The Offeror is structured as a corporation.

Highlighted strengths/commitments:

Appendix A – Pass-Fail Requirements

- Kokosing (Lead Contractor) has delivered 40 DB projects valued at \$1.8B.
- Michael Baker (Lead Designer) has delivered 65 DB projects valued at \$7.5B. ENR ranks them among the top 10% of design firms by ENR.
- REL has provided quality review roles on some of the largest projects in Ohio, including the Columbus Crossroads project (IDQM and IQF design reviews) and the CUY-90 Innerbelt CCG2 (design reviews and audits as part of the ODOT Quality Oversight team).
- There have been positive recent experiences with Brownstone Grey in similar roles within the region and community with Workforce development, Outreach, and Business development.
- The team demonstrated a good history of working together.

3. Key Personnel

Highlighted strengths/commitments:

- DB Project Manager
 - “Kerry has worked on multiple previous projects with DB Construction Project Manager/Engineer Brad Mast and on the Columbus Crossroads project with Design IQF Project Manager Dave Rinehart.”
 - Good recent relevant experience with ODOT on project of similar size and complexity. Good experiences of projects of similar scope.
- DB Diversity/Outreach Lead Manager
 - Recent relevant experiences with workforce development and outreach. Has demonstrated understanding of the needs of the community and has understanding needs of disadvantaged businesses.
- Design IQF Project Manager
 - Well-rounded relevant project experience, known to be responsive and extremely capable. Has significant and relevant direct experience in ODOT’s IQF role in similar position.

TGR:

Strength: 1

Minor Strength: 5

Minor Weakness: 3

Weakness: 0

1. Contractor names 23 specific people from 9 identified firms. Organizational chart depicting pertinent project roles with named persons.

Highlighted strengths/commitments:

- In addition to Key Personnel, TGR commits:
 - Executive Oversight (George Mezey, Trumbull; George Palko, GLC; and Jim Ruhlin, Ruhlin)
 - Safety (Bobie Sue Clawson, Trumbull)
 - Public Involvement Manager (Karen Lenehan)
 - Roadway Design Lead (Dennis Jennings, HDR)

Appendix A – Pass-Fail Requirements

- Geotechnical Design Lead (Doug Voegelé)
- Structures (Tom Eberhardt, HDR and Davin Ng, GPD)
- Quality Control (Bill Hurd, HDR)
- Landscape Architecture (Lance Theis, HDR)
- Rail/Utility/City Support (Jon Winer, HDR and David Neumeyer, GPD)*
- DB Coordinator (Steve Layer, GLC)*
- Superintendent (Tom Hill, Ruhlin)
- Project Controls (Phil Hannah, Trumbull)
- QC Manager (Courtney Norris, Trumbull)

- There is an indirect connection from the IQF to ODOT

Noted potential concerns:

- No ties from Design IQF to design roles.
- No relationship between DB Rail/Utilities/City Coordinator and Construction

2. The Offeror is structured as a Joint Venture of Trumbull, Great Lakes, and Ruhlin.

Highlighted strengths/commitments:

- Recently positive experience in region as a Joint Venture
- HDR (Lead Designer) was ranked the 9th Largest Design Firm by ENR in 2016. They have completed “\$14B construction volume as lead design on 47 DB projects in 32 states.”
- Firm has good experience in Workforce development.

Noted potential concerns:

- Integral Management has limited experience in transportation construction and consulting project outreach in northeast Ohio.

3. Key Personnel

Highlighted strengths/commitments:

- DB Project Manager
 - Good recent relevant experience with ODOT on project of similar size, scope, and complexity in similar role.
- DB Construction Project Manager
 - Very good recent experience of projects with similar size, scope, and complexity (CCG1). Excellent partnering skills.
- DB Diversity/Outreach Lead Manager
 - Recent experiences with workforce development; no noted experience with balance of role. Currently involved with project specific role, but project early in the contract. Known understanding of community issues.
- Design IQF Project Manager
 - Very good bridge design experience. Known to be responsive and capable, but limited for other design elements outside of structures. Experience in similar role not demonstrated.

LANE:

Strength: 1

Minor Strength: 3

Minor Weakness: 2

Weakness: 0

1. Contractor names 41 specific people from 14 identified firms. The organizational chart depicts pertinent project roles with many named individuals.

Highlighted strengths/commitments:

- In addition to Key Personnel, TGR commits:
 - Design IQF Technical Advisor (Jane Jordan, Parsons Brinckerhoff)
 - Design Quality Manager (Todd Long, ms consultants)
 - Diversity/Outreach Support (Vena Moore, Minority Business Solutions)
 - Health & Safety (Steve Durbin, LANE)
 - Public Information Manager (Dannette Render, DAR Public Relations)
 - Risk Analysis (Tom McClellan, LANE)
 - Scheduler (Kane Lee, LANE)
 - DB Coordinator (Harry Jack, LANE)
 - Roadway Lead (Steve Gealy, ms consultants)
 - Structures Lead (Gary Gardner, ms consultants)
 - MOT Lead (James Lacher, ms consultants)
 - Roadway Lighting Lead (Doug Blegen, ms consultants)
 - Drainage/SWPPP Lead (Sean Riffle, ms consultants)
 - Water/Sanitary Lead (Jeff Rober, ms consultants)
 - Sustainability Lead (Kari Mackenbach, ms consultants)
 - Traffic Control/Signals (Joy Lanham, Lanham Engineering)
 - Railroad Track Design (Paul Bobby, STV)
 - Geotechnical Lead (Peter Lee, Resource International)
 - Environmental/Permitting Design (Andrew Campbell, ASC Group)
 - Subsurface Utility Engineering (Mark Ward, Resource International)
 - Aesthetics and Enhancements (Jayme Schwartzberg, DERU Landscape Architecture)
 - Surveying Lead (Scott Horan, Euthenics)
 - Construction Quality Manager (Harry Henrich, LANE)
 - Project Engineer (Allen Smith, LANE)
 - Roadway Engineer (Alex Rhubart, LANE)
 - Structures Engineer (Ben Junco, LANE)
 - Utilities Engineer (Christopher Crouch-Foster, LANE)
 - MPT Engineer (Keith Johnson, LANE)
 - Project Superintendent (Abe Lawson, LANE)
 - Assistant Superintendent – Roadway (Dennis Rodkey, LANE)
 - Assistant Superintendent – Structures (James Conant, LANE)
 - Assistant Superintendent – Utilities (Bryce Locke, LANE)
 - Assistant Superintendent – MPT (Brian Sutherland, LANE)

- Environmental Coordinator (Jacqui Yeck, LANE)

Noted potential concerns:

- NS Rail coordinator (STV – George Zimmerman) co-location with NS in Atlanta, not co-located with the DBT.
2. The Offeror is structured as a corporation.

Highlighted strengths/commitments:

- LANE (Lead Contractor) “was named 2015 Top Contractor by ENR MidAtlantic, and is ranked #1 Top Highway Contractor and #55 in Top DB Firms by ENR.” They have worked on 70 DB projects ranging from \$13M and \$2.3B.
- WSP – Parsons Brinckerhoff (IQF) “provides more than 130 years of combined experience in infrastructure and transportation projects...PB also spearheaded the implementation work for IQF systems, including the photo management system, the inspection reporting system, and the material and testing systems.”

Noted potential concerns:

- No information provided for workforce development; no experience provided in transportation construction and consulting project outreach in northeast Ohio for the Adrian Maldonado & Associates business experiences.
3. Key Personnel

Highlighted strengths/commitments:

- DB Project Manager
 - Has good relevant experience of role in large DB projects. Experiences with large transit projects

Noted potential concerns:

- DB Project Manager
 - Experiences are not on projects of comparable complexity (i.e. No urban arterial projects were listed). No regional experience. 50% committed for Design.

RFQ Scoring Topic: Offeror’s Capabilities and Experience

Basis of Evaluation for DBT Capabilities and Experience:

The TET evaluated how well the Offeror demonstrated specific information as it relates to available resources, anticipated project management methodologies, and previous experience. Resources and Project Management Methodologies were to address Design and Construction.

Topics:

How well the Offeror demonstrates their design, construction and management experience and capabilities by considering the following:

Appendix A – Pass-Fail Requirements

Resources:

1. Resources that will be made available, and from what source, to perform the work for the proposed project.
2. How the DBT will allocate its available resources and manage production levels to ensure that the Project completion date will be met and how appropriate resources and capacity will be available and committed to perform the work.
3. Notable expertise or other special capabilities of members of DB project team that are critical to their project approach.

Project Management Methodologies:

1. Evaluate the Offeror's description of how the Offeror will provide an integrated team approach. Evaluate the methods to coordinate between Construction, Design, and Quality activities while considering ongoing diversity, inclusion, and outreach efforts. The methodology should address the integration of all entities including the Department and the City of Cleveland.
2. Evaluate how the Offeror will coordinate utilities and with NS and GCRTA.
3. Evaluate the Offeror's description of internal procedures for planning and monitoring the Project's progress helping to ensure timely completion and achievement of critical project milestones while considering project risks.

Past Projects:

Evaluate the recent relevant experience of the Offeror by reviewing the narrative descriptions of the ten (10) relevant projects listed.

Evaluate:

1. For Contractor(s) – The construction of projects of similar scope and complexity and how those experiences are applicable to the requirements of this Project.
2. For the Designer(s)/IQF(s) – The design of projects of similar scope and complexity and how those experiences are applicable to the requirements of this Project.
3. Evaluate the timely or early completion of projects of similar scope and complexity and how those experiences relate to this Project.
4. Evaluate notable project challenges and subsequent mitigation efforts by the Offeror to overcome those project challenges. Evaluate how the challenges and mitigation efforts may relate to this Project.
5. Evaluate outreach and inclusion efforts on past projects.

Evaluate the Offeror's listing of all projects designed and/or construction by the Lead Designer and/or Lead Contractor that have resulted in the assessment of liquidated damages and/or penalties exceeding \$50,000 in the last five years (Part J of SOQ).

Walsh:

Strength: 6

Minor Strength: 12

Minor Weakness: 2

Weakness: 0

1. Demonstrated sufficient experience and capacity to deliver the project, and an acceptable approach to allocating resources.

Highlighted strengths/commitments:

- Team focused on personnel planned to bring to the project. Limited information provided to demonstrate the ability to bring sufficient equipment, but past recent experience and company has the ability to provide sufficient resources.
- Identified a Public Information Manager who has good experiences in role (not a requested position, but person has had positive results).

Noted potential concerns:

- On CCG2, GSI performed compliance monitoring only – not involved in outreach.

2. Team Approach and Third-Party Coordination

Highlighted strengths/commitments:

- Task force leads will regularly meet with design, construction, diversity, and quality managers
- Subcontractors will participate in a Project orientation to ensure that the goals and values of both our team and ODOT are upheld, including our shared commitment to safety, quality, diversity, and sustainability.
- Demonstrated familiarity with local agency requirements/protocols.
- Demonstrated familiarity with NS and GCRTA requirements/protocols.

3. Project experience

Highlighted strengths/commitments:

- Contractor demonstrated experiences from 5 projects relevant to this project with similar scope and size.
- Many of the Key Personnel have previously performed a similar role.

4. Liquidated damages determined to not be significant.

Kokosing:

Strength: 7

Minor Strength: 16

Minor Weakness: 1

Weakness: 0

1. Demonstrated sufficient experience and capacity to deliver the project, with a good description of resource allocation.

Highlighted strengths/commitments:

- Team has sufficient resources with good capabilities. Past projects have demonstrated capacity.
- All key design personnel are within close proximity with support staff within proximity.
- Good description of Design, IQF, and Construction resource allocation
- Wyatt Brownlee and Maurice Steven’s established local relationships and specific knowledge of the disadvantaged contractor and workforce community in Cleveland
- Able to perform majority of work and has past history of properly managing subcontractors.

2. Team Approach and Third-Party Coordination

Highlighted strengths/commitments:

- The Kokosing DBT will utilize a full-time Design-Build Coordinator on this project
- Weekly design coordination task force meetings attended by personnel from design, construction, IQF, and ODOT, with invitations to the City of Cleveland and other Stakeholders
- Commit that additional member firms, Independence Excavating, E.L. Robinson, CH2M, and Brownstone Grey will co-locate at the project management office during their scope of work
- Early design Buildable Units will be structured to include subcontracting packages for new, small, local, and socially and economically disadvantaged businesses to allow ample time for subcontractor solicitation and inclusion
- To ensure that potential subcontractors and suppliers have the most current available plans, a ShareFile site will be established specifically for the project which serves and on online plan room.
- Single file-sharing sites (ProjectWise and SharePoint) hosted by Baker
- Demonstrated familiarity with local agency requirements/protocols.
- All identified utilities will be contacted during prebid phase
- Utility coordination kickoff meeting will be held shortly after project award. Utility companies will be part of weekly task force meetings
- Demonstrated familiarity with NS and GCRTA requirements/protocols.
- Railroad representatives will be encouraged to attend the weekly task force meetings

3. Project Experience

Highlighted strengths/commitments:

- Contractor demonstrated experiences from 7 projects relevant to this project with similar scope and size.
 - Many of the Key Personnel have previously performed a similar role.
4. Liquidated damages determined to be of minor significance.

TGR:

Strength: 7

Minor Strength: 11

Minor Weakness: 0

Weakness: 0

1. Demonstrated sufficient experience and capacity to deliver the project, with local resources already deployed in the region.

Highlighted strengths/commitments:

- Demonstrated sufficient local resources. Currently mobilized within region. Past project have demonstrated capacity.
 - TGR has been partnering with these same stakeholders as part of the CCG2 project for the past three years. The Great Lakes Construction Co. and GPD are currently coordinating with these entities as part of the ongoing OC2 contract.
 - Recent good experiences with coordinating with GCRTA, NS, and local utilities – have proven recent success as a JV and with GLC & Ruhlin experiences.
2. Team Approach and Third-Party Coordination

Highlighted strengths/commitments:

- Each task force will include representatives from design, construction, quality and diversity
 - During the RFP stage, task force action items will include identification of opportunities and development of bid packages for new, small, local, and disadvantaged businesses.
 - Post-award efforts will be focused on workforce development
 - As design transitions into construction, Ryan Simon will remain the point of contact for these third parties to maintain consistency.
 - Representatives from the utilities will be invited to actively participate in weekly Task Force meetings.
 - Two deputy coordinators will assist Ryan Simon with handling the diverse needs of each of these critical facility owners.
 - Demonstrated familiarity with local agency requirements/protocols.
 - Demonstrated familiarity with NS and GCRTA requirements/protocols.
3. Project Experience

Highlighted strengths/commitments:

Appendix A – Pass-Fail Requirements

- Contractor demonstrated experiences from 6 projects relevant to this project with similar scope and size.
 - Many of Key Personnel have previously performed a similar role.
4. Liquidated damages determined to not be significant.

LANE:

Strength: 4

Minor Strength: 10

Minor Weakness: 1

Weakness: 0

1. The Offeror demonstrated sufficient experience and capacity to deliver the project, however the overall resource discussion is limited.
2. Team Approach and Third-Party Coordination

Highlighted strengths/commitments:

- The team will set up initial meetings with each of the utility owners.
- Progress meetings will be held with all utilities on a biweekly basis.
- George Zimmerman (the NS coordinator) provides 30 plus years of embedded work with Norfolk Southern and is located in Atlanta, GA at the NS headquarters where most of their work and coordination will occur.
- They will maintain and update a cost and resource (men, equipment and materials) loaded schedule.
- The schedule will be updated regularly to identify critical items of work, labor, equipment and material needs to ensure no lost time due to improper planning or changed conditions. They are committing to not requesting time extensions for change of conditions.
- Very lengthy discussion of Project Management Methodology section. Considerable good detail provided.

Noted potential concerns:

- Demonstrated limited experience with local agencies/stakeholders.

3. Project Experience

Highlighted strengths/commitments:

- Contractor demonstrated experiences from 5 projects relevant to this project with similar scope and size.

Noted potential concerns:

- Project descriptions provided did not list involved Key Personnel proposed as part of the OC3 Project as requested in the RFQ.

4. Liquidated damages determined to be of some significance.

RFQ Scoring Topic: Diversity and Inclusion

The TET evaluated the Offeror’s specific information as it relates their internal business practices to provide a diverse workforce, how these practices encourage DBE participation, what past efforts or experiences expanding the pool and mentoring DBEs or minority businesses.

Topics:

- Evaluate the Offeror’s business practices which ensure all New, Small, Local, and Disadvantaged Business Enterprises have had equal or better opportunity for inclusion within Projects.
- Evaluate the Offeror’s past efforts or experience on projects which have mentored or expanded the pool of new, small, local, or disadvantaged businesses
- Evaluate the Offeror’s experiences with Workforce Development and placement, particularly in regards to utilizing non-traditional approaches to engage traditional disadvantaged demographics or workers with the project regions.

Walsh:

Strength: 8

Minor Strength: 4

Minor Weakness: 1

Weakness: 0

1. Include some discussion of efforts to be done specifically on OC3, although general Business Practices for the Development of project opportunities are “passive”.

Highlighted strengths/commitments:

- Each member firm will prioritize efforts by participating in outreach, working with subcontractors to maximize participation.
- Demonstrates an understanding of need for all major DBT members to be involved with mentoring (Contractor and Designer).
- Will host two match-making events during the pursuit
- After award, will continue to host DBE outreach events, meet individually with NSLE firms, and coordinate with certifying organizations
- Some of the areas where the Walsh DBT can assist are business strategies, project leads, and Project financial planning.
- The Walsh DBT tailors scope packages to meet the capabilities or prequalifications of NSLE firms
- Set-asides provide NSLE firms an opportunity to compete against a smaller, more selective group of their peers.
- Walsh identifies and sublets work that is normally self-performed
- Halle will provide monthly status reports to ODOT and DB Project Manager John Tracy to track the effectiveness of the DBT efforts.

Noted potential concerns:

Appendix A – Pass-Fail Requirements

- General Business Practices for the Development of project opportunities are “passive”.
2. Provided past efforts or experience to mentor or expand the pool of NSLE businesses

Highlighted strengths/commitments:

- Walsh has entered into formal mentor-protégé and other teaming arrangements with DBE contractors.
- Demonstrates an understanding of need for all major DBT members to be involved with mentoring (Contractor and Designer).

3. Experiences with workforce development

Highlighted strengths/commitments:

- On Innerbelt CCG1, Walsh greatly exceeded the workforce goal of 40 trainees with 147 trainees (43 minority and 18 female). On the Dan Ryan Expressway, Walsh achieved outstanding EEO utilization of 45%, exceeding the federal minority hiring goals of 19.6% and 6.9% for women.
- In 2016, the inaugural year, 28 Akron students were matched with 20 area engineering and construction firms.

Kokosing:

Strength: 11

Minor Strength: 7

Minor Weakness: 0

Weakness: 0

1. Past practices and experiences demonstrate the DBT (including contractor, designer, and sub consultants) have participated in several business development and workforce development activities.

Highlighted strengths/commitments:

- Wyatt Brownlee actively managed the project specific Diversity and Outreach program, acting as the lead contact with the Department and directing the local community outreach efforts.
- Maurice Stevens, President of Career Development and Placement Strategies, will assist in the workforce development efforts.
- Already made initial contact with the firms that attended ODOT’s August 12, 2016 OC3 Subcontractor Information session (verified)
- Prebid design is prioritized for subcontract packages focused on disadvantaged businesses
- Encourage face to face meetings during the procurement process to ensure the firms have access to all available information.
- Require major subcontractors to match the project specific diversity goals.
- Routinely holds project specific outreach events to promote diversity and inclusion, and commits to conducting similar events for OC3

Appendix A – Pass-Fail Requirements

- Consistently attends ODOT outreach events with verifiable participation.
2. Provided past efforts or experience to mentor or expand the pool of NSLE businesses

Highlighted strengths/commitments:

- Kokosing participated in the ODOT/OCA Mentor-Protégé Program
- As past president of the Northern Ohio Minority Business Council, Wyatt Brownlee was responsible for obtaining over 400 MBE certifications

3. Experiences with workforce development

Highlighted strengths/commitments:

- CDPS developed the Rising Above program in 2005 which assist citizens of the Greater Cleveland community.
- 2009: Workforce development training to more than 3,500 individuals
- Expert Reclaim is a social enterprise in partnership with the Cleveland Foundation and Cuyahoga County Office of Reentry that has created nearly 40 job opportunities in a two year period. CDPS expanded the program to Cleveland Wards 4-6.
- Baker collaborated with John Hay High School as part of their OC2 pursuit to identify graduating students and recent graduates and alumni from Ward 4, 5, and 6.
- Currently partners with over 20 Vocational and Career Technical Services
- Scott Mesick co-chairs the OCA Cleveland Chapter Sub-committee that conducts the High School/College Constructor for a Day program to promote construction work needs for Kokosing and the heavy highway industry.
- Kokosing senior-level executives sit on the State Boards for the Laborer and Operator Unions, participates in career/jobs fairs including veteran job fairs, and provides a form shop apprenticeship and training program that annually trains 20 high school students and recruits.

TGR:

Strength: 5

Minor Strength: 4

Minor Weakness: 1

Weakness: 0

1. Included substantial discussion and commitments for outreach specific to OC3.

Highlighted strengths/commitments:

- Our team will host an independent outreach event at a venue local to the project.
- Our team will hold face-to-face meetings with interested businesses identified during our outreach.
- Individual scope packages will be tailored to approximately match their capabilities.
- Mentor subs on what prime contractors are expecting to see on a quote.
- Host post-bid outreach events to engage new, small, local and disadvantaged businesses
- Consistently attends ODOT outreach events with verifiable participation.

Noted potential concerns:

- Current practices of 1 member (GLC) of JV has not yet followed through on commitments made within Technical Proposals centering on similar topics.
 - No discussion of D&I Consultant inclusion in business practices.
2. Many specific examples of good past practices

Highlighted strengths/commitments:

- Many specific examples of good past practices in the development of new companies.
3. Experiences with workforce development

Highlighted strengths/commitments:

- Workforce Development will engage community groups, including HOLA, microbusinesses throughout Wards 4-6 with revenues less than \$100,000, and religious and clergy leaders.
- TGR exceeded goals for on-the-job training on the CCG2 project. A table was provided showing these positions

LANE:

Strength: 2

Minor Strength: 1

Minor Weakness: 1

Weakness: 0

1. Included generalities and lacks DBT relevant specifics

Highlighted strengths/commitments:

- Supplementing the outreach efforts will be the cutting edge expertise of Ms. Dannette Render of DAR Public Relations (DAR), who as Public Information Manager will served as the Point of Contact for the LANE Team.
- In January 2015 and March 2016, LANE partnered with the United States Department of Transportation's Office of Small and Disadvantaged Business Utilization and the Surety & Fidelity Association of America to promote bond-readiness, increase business acumen and capacity, and ultimately improve the competitiveness of DBE firms.

Noted potential concerns:

- Demonstrated focus on upcoming plans, but provided limited background and history
2. Included generalities and lacks DBT relevant specifics
 3. Focus on upcoming plans, but provided limited background and history.

Highlighted strengths/commitments:

Appendix A – Pass-Fail Requirements

- Successfully recruited, referred and placed high school students who expressed an interest in the Building Trades industry into community soft skills programs, who then place them in Pre-Apprentice programs to work on local projects.

Noted potential concerns:

- Focusing on upcoming plans, but provided limited background and history.

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SOQ Evaluation Recommended “Shortlisted” Teams

The TET recommends the following Offerors be “shortlisted” and invited to develop a Technical and Price Proposal:

- *Walsh Construction*
- *Kokosing*
- *TGR Joint Venture*

Scoring Breakdown

Evaluation Criteria	Maximum Points	Walsh Construction	Kokosing	TGR Joint Venture	LANE Construction
Project Approach	15	11	15	14	11
Proposed Design-Build Team	30	28	30	29	25
Capabilities and Experience	35	35	34	32	29
Diversity & Inclusion and Outreach	30	28	30	26	23
SOQ Ratings:		102	109	101	88

Concurrence

The scoring information within this document is a reflection of the diligent and fair evaluation performed by the members of the Technical Evaluation Team. The Executive Level Evaluation Team has been presented with the information and concur with the recommendations.

	Jim Barna ODOT Chief Engineer
	Brad Jones Deputy Director - ODOT Construction Management
	Myron Pakush Deputy Director ODOT D12
	Dave Slatzer Deputy Director – ODOT Division of Engineering
	Lauren Purdy Deputy Director – ODOT Opportunity, Diversity, and Inclusion
	Jennifer Townley Deputy Director – ODOT Planning