



BOARD OF DIRECTORS

Agenda Report

Headquarters
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File #: 2024-3984

Agenda Date: 1/22/2025

Agenda Item No: 7.

FROM: Robert Thompson, General Manager
Originator: Lorenzo Tyner, Assistant General Manager

SUBJECT:

EASEMENT EVALUATION SERVICES

GENERAL MANAGER'S RECOMMENDATION

RECOMMENDATION:

- A. Approve aggregate Professional Consultant Services Agreements to Paragon Partners Consultants, Inc.; Michael Baker International, Inc.; and D. Woolley & Associates, Inc. to provide assessments and documentation of all OC San easements and full surveys for selected easements, Specification No. CS-2024-639BD, for a total amount not to exceed \$2,700,000; and
- B. Approve a contingency of \$540,000 (20%) to address unknown field conditions.

BACKGROUND

Orange County Sanitation District's (OC San) collection system infrastructure traverses the public right-of-way and private property throughout north and central Orange County. This infrastructure consists of buried pipes and surface access points known as manholes. The piping conveys raw sewage to the two treatment plants.

Much of the collection system infrastructure was constructed as the areas of the county were developed. Some of the buried piping is located in the public right-of-way, such as streets, while other sections cross under private property. For areas involving private property, an easement typically officially encumbers the private property, outlining how the encumbered property shall be maintained. OC San has approximately 500 easements throughout the service area, dating back to the early 1960s. Over time, local municipalities and property owners have constructed permanent structures or increased their property footprint without the explicit approval of OC San, resulting in encroachment and access issues that currently affect our maintenance of critical infrastructure. Over the years, OC San has mitigated these issues on a case-by-case basis, which has exposed additional concerns regarding the magnitude of issues and problems throughout our service area.

RELEVANT STANDARDS

- Protect OC San assets
- Ensure the public's money is wisely spent

- Operate and maintain facilities to minimize impacts on surrounding communities, including odor, noise, and lighting

PROBLEM

OC San lacks information on the conditions of its easements within its service area, including survey and title information, accessibility of its infrastructure, and proper property title documentation.

PROPOSED SOLUTION

Engage with professional service providers to conduct thorough condition reports on the current status of all OC San easements. This includes, but is not limited to, performing land surveys as necessary, conducting title research, taking photographs and videos, and filing relevant documentation with the local County Assessor's office.

TIMING CONCERNS

Delaying this effort exposes OC San to continuing to deal with unapproved encroachments approved by local municipalities and property owners, which can result in potential litigation from asserting property rights. As a result, OC San is recommending proceeding as an aggregate award to ensure that the work is completed in an efficient and cost-effective manner.

RAMIFICATIONS OF NOT TAKING ACTION

OC San will be exposed to potential litigation from lack of easement management resulting from outdated property record information and reports.

PRIOR COMMITTEE/BOARD ACTIONS

N/A

ADDITIONAL INFORMATION

A Request for Proposal was issued on September 19, 2024 via PlanetBids. On October 2, 2024, a mandatory job walk was conducted where proposers met at OC San Headquarters and then took a bus to three easement sites. Proposals were due on November 7, 2024. OC San received four (4) proposals which are valid for 180 calendar days from the proposal due date.

Prior to the receipt of proposals, an Evaluation Team was formed of OC San staff. Individual scoring was the chosen method of evaluation for this procurement. Members of the team performed an independent review of the proposals and later met as a group with the assigned Buyer to discuss their preliminary scores and discuss questions or concerns they had. Proposals were evaluated based on the following criteria:

Criterion	Weight
1. Qualifications of the Firm	20%
2. Staffing & Project Organization	20%

3. Work Plan	40%
4. Cost	20%

The Evaluation Team first reviewed and scored the proposals based on the criteria listed above, other than cost.

Rank	Proposer	Criterion 1 (Max 20%)	Criterion 2 (Max 20%)	Criterion 3 (Max 40%)	Subtotal Score (Max 80%)
1	Paragon Partners Consultants, Inc.	18%	17%	35%	70%
2	Michael Baker International, Inc.	17%	17%	31%	65%
3	D. Woolley & Associates, Inc.	17%	14%	32%	63%
4	Stantec Consulting Services	16%	13%	21%	50%

After the cost proposals were opened, a clarification meeting with each firm for Phase I Inspection Work took place on December 12 and 13, 2024 to better understand the price disparities between each firm.

The goal of the clarification meeting was to understand why certain firms added surveying personnel to Phase 1 when Phase 1 does not call for surveying work.

The top three firms were invited to submit their Best and Final Offer (BAFO) but only include personnel who will be conducting "Inspection Work" in Phase 1 and not surveying work.

Rank	Proposer	Original Cost	BAFO
1	Paragon Partners Consultants, Inc.	\$ 759,363.00	\$ 752,453.00
2	Michael Baker International, Inc.	\$2,167,280.00	\$2,167,280.00
3	D. Woolley & Associates, Inc.	\$2,573,975.00	\$2,325,215.00

While Phase 1 work represents an absolute known need, Phase 2 is surveying work, which will be done on an as-needed basis depending on the assessments provided in Phase 1. Phase 2 is unknown as far as hours and quantities, and the complexity of the survey work.

CEQA

N/A

FINANCIAL CONSIDERATIONS

This request complies with authority levels of OC San's Purchasing Ordinance. This item has been budgeted (Budget FY 2024-25 and 2025-26 Line item: Section 6, Page 12) and the budget is sufficient for this action.

<u>Date of Approval</u>	<u>Contract Amount</u>	<u>Contingency</u>
01/22/2025	\$2,700,000	\$540,000

ATTACHMENT

The following attachment(s) may be viewed on-line at the OC San website (www.ocsan.gov) with the complete agenda package:

- Professional Consultant Services Agreements