



## Agenda Report

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**FROM:** James D. Herberg, General Manager  
Originator: Kathy Millea, Director of Engineering

**SUBJECT:**

### **MOVE MANAGEMENT CONSULTING SERVICES**

### **GENERAL MANAGER'S RECOMMENDATION**

#### RECOMMENDATION:

- A. Approve a Professional Consultant Services Agreement to CBRE, Inc. to provide Move Management Consulting Services, Specification No. CS-2022-1336, for a total amount not to exceed \$108,390; and
- B. Approve a contingency of \$10,839 (10%).

### **BACKGROUND**

Orange County Sanitation District's (OC San) Headquarters Complex at Plant No. 1, Project No. P1-128A, will construct a new Headquarters Building on the north side of Ellis Avenue to house administrative, technical, and engineering staff. The Headquarters Building will also include surface parking and a pedestrian/utility bridge over Ellis Avenue to Plant No. 1. OC San will need to relocate staff to the new Headquarters Building upon completion. The move will include relocating approximately 300 employees from seven different locations to the new Headquarters Building.

### **RELEVANT STANDARDS**

- Provide a safe and collegial workplace
- Ensure the public's money is wisely spent
- Maintain a culture of improving efficiency to reduce the cost to provide the current service level or standard

### **PROBLEM**

OC San staff has limited experience moving staff of this magnitude. An experienced move management company is needed to develop a comprehensive relocation plan to undertake this transition in a cost-effective and efficient fashion. In addition, if this move management were to be done in-house with existing staff, it will cause a significant strain and limit resources on other projects and efforts currently underway.

## **PROPOSED SOLUTION**

Approve the Professional Consultant Services Agreement with CBRE, Inc. to provide move management consultant services. A professional move management company will create a more seamless relocation plan to limit downtime and cost.

## **TIMING CONCERNS**

In order to relocate 300 employees into the new Headquarters Building, move management services should begin no later than the beginning of 2023. This time frame will allow OC San to initiate the contract, create the plan, procure movers, and prepare staff administratively and physically to relocate employees starting December 2023, when the new Headquarters Building is complete.

## **RAMIFICATIONS OF NOT TAKING ACTION**

If a move management consultant is not selected, it will affect the implementation of staff relocation and be less efficient and more disruptive to on-going initiatives.

## **PRIOR COMMITTEE/BOARD ACTIONS**

N/A

## **ADDITIONAL INFORMATION**

The goal of the agreement is for the Consultant to provide the planning and move management which will result in a seamless and smooth transition for OC San staff. The Consultant will be responsible for assisting with all elements of the move into the new Headquarters Building, including the following:

- Pre-move coordination
- Development and maintenance of a moving schedule
- Development of the moving vendor scope of work
- Assistance reviewing moving service bids
- Oversight of all move logistics

### Consultant Selection

OC San requested and advertised for proposals for Move Management Consultant Services on July 26, 2022. The following evaluation criteria were described in the Request for Proposed (RFP) and used to determine the most qualified Consultant.

CRITERION	WEIGHT
Qualifications & Experience of Firm	25%
Proposed Staffing & Project Organization	25%
Work Plan	30%
Cost	20%

Three proposals were received on August 9, 2022 and evaluated in accordance with the evaluation process set forth in OC San’s Purchasing Ordinance by a pre-selected Evaluation Team consisting of the following OC San staff: Administration Manager, Principal Staff Analyst, Senior Engineer, Safety and Health Supervisor, and Information Technology Supervisor. The Evaluation Team also including one non-voting representative from the Purchasing Division.

The Evaluation Team scored the proposals on the established criterion as summarized below:

Rank	Proposer	Qualifications of Firm (Max 25%)	Proposed Staffing and Project Organization (Max 25%)	Work Plan (Max 30%)	Subtotal Score (Max 80%)
1	CBRE, Inc.	24%	21%	29%	74%
2	CBSI	19%	18%	18%	55%
3	E-Logic, Inc.	3%	3%	3%	9%

All proposals were accompanied by a sealed cost proposal. Only the cost proposals for the two highest ranked firms were opened. Only the cost proposal of the top highest ranked firm was negotiated.

Rank	Proposer	ORIGINAL COST	BAFO (if applicable)
1	CBRE, Inc.	\$110,750	\$108,390
2	CBSI	\$114,840	N/A

Based on the scoring shown below, CBRE, Inc. was selected as the most qualified Consultant.

Rank	Proposer	Subtotal w/o Presentation (Max 80%)	Cost (Max 20%)	Total Weighted Score (Max 100%)
1	CBRE, Inc.	74%	20%	94%
2	CBSI	55%	19%	74%

**CEQA**

N/A

## **FINANCIAL CONSIDERATIONS**

This request complies with authority levels of OC San's Purchasing Ordinance. This item has been budgeted in the FY 2022-23 Budget - General Manager's Department.

## **ATTACHMENT**

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

- Professional Consultant Services Agreement