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**Agenda - Final**

**Thursday, October 20, 2022**

**11:00 AM**

To give written or live public comment, please see the top of page 4

## **Construction Committee**

*Fernando Dutra, Chair*

*Janice Hahn, Vice Chair*

*Mike Bonin*

*Jacquelyn Dupont-Walker*

*Sheila Kuehl*

*Gloria Roberts (Interim), non-voting member*

*Stephanie Wiggins, Chief Executive Officer*

**METROPOLITAN TRANSPORTATION AUTHORITY BOARD RULES**  
(ALSO APPLIES TO BOARD COMMITTEES)

**PUBLIC INPUT**

A member of the public may address the Board on agenda items, before or during the Board or Committee's consideration of the item for one (1) minute per item, or at the discretion of the Chair. A request to address the Board must be submitted electronically using the tablets available in the Board Room lobby. Individuals requesting to speak will be allowed to speak for a total of three (3) minutes per meeting on agenda items in one minute increments per item. For individuals requiring translation service, time allowed will be doubled. The Board shall reserve the right to limit redundant or repetitive comment.

The public may also address the Board on non agenda items within the subject matter jurisdiction of the Board during the public comment period, which will be held at the beginning and/or end of each meeting. Each person will be allowed to speak for one (1) minute during this Public Comment period or at the discretion of the Chair. Speakers will be called according to the order in which their requests are submitted. Elected officials, not their staff or deputies, may be called out of order and prior to the Board's consideration of the relevant item.

Notwithstanding the foregoing, and in accordance with the Brown Act, this agenda does not provide an opportunity for members of the public to address the Board on any Consent Calendar agenda item that has already been considered by a Committee, composed exclusively of members of the Board, at a public meeting wherein all interested members of the public were afforded the opportunity to address the Committee on the item, before or during the Committee's consideration of the item, and which has not been substantially changed since the Committee heard the item.

In accordance with State Law (Brown Act), all matters to be acted on by the MTA Board must be posted at least 72 hours prior to the Board meeting. In case of emergency, or when a subject matter arises subsequent to the posting of the agenda, upon making certain findings, the Board may act on an item that is not on the posted agenda.

**CONDUCT IN THE BOARD ROOM** - The following rules pertain to conduct at Metropolitan Transportation Authority meetings:

**REMOVAL FROM THE BOARD ROOM** The Chair shall order removed from the Board Room any person who commits the following acts with respect to any meeting of the MTA Board:

- a. Disorderly behavior toward the Board or any member of the staff thereof, tending to interrupt the due and orderly course of said meeting.
- b. A breach of the peace, boisterous conduct or violent disturbance, tending to interrupt the due and orderly course of said meeting.
- c. Disobedience of any lawful order of the Chair, which shall include an order to be seated or to refrain from addressing the Board; and
- d. Any other unlawful interference with the due and orderly course of said meeting.

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**NOTE: ACTION MAY BE TAKEN ON ANY ITEM IDENTIFIED ON THE AGENDA**

**Live Public Comment Instructions:**

Live public comment can only be given by telephone.

The Committee Meeting begins at 11:00 AM Pacific Time on October 20, 2022; you may join the call 5 minutes prior to the start of the meeting.

Dial-in: 888-251-2949 and enter  
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Los comentarios publicos en vivo solo se pueden dar por telefono.

La Reunion de la Junta comienza a las 11:00 AM, hora del Pacifico, el 20 de Octubre de 2022. Puedes unirme a la llamada 5 minutos antes del comienso de la junta.

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**Written Public Comment Instruction:**

Written public comments must be received by 5PM the day before the meeting. Please include the Item # in your comment and your position of "FOR," "AGAINST," "GENERAL COMMENT," or "ITEM NEEDS MORE CONSIDERATION."

Email: BoardClerk@metro.net  
Post Office Mail:  
Board Administration  
One Gateway Plaza  
MS: 99-3-1  
Los Angeles, CA 90012

**CALL TO ORDER****ROLL CALL**

APPROVE Consent Calendar Item: 24.

Consent Calendar items are approved by one vote unless held by a Director for discussion and separate action.

**CONSENT CALENDAR**

- 24. SUBJECT: OFFICE OF THE INSPECTOR GENERAL CHANGE ORDER** [2022-0652](#)  
**CONSTRUCTION SPOT CHECKS**

**RECOMMENDATION**

RECEIVE AND FILE Office of the Inspector General Change Order Construction Spot Check Report for the period June 1 to August 31, 2022.

**Attachments:** [Attachment A - Data Sheet October 2022 Spot Check](#)  
[Attachment B - October 2022 Recommendation Response](#)  
[Presentation](#)

**NON-CONSENT CALENDAR**

- 25. SUBJECT: SEPULVEDA TRANSIT CORRIDOR PROJECT** [2022-0529](#)

**RECOMMENDATION**

AUTHORIZE the Chief Executive Officer (CEO) to:

- A. AWARD AND EXECUTE Contract No. AE82658000 to Anser Advisory Management, LLC for Program Management/Pre-Development Agreement (PDA) Oversight Services for the Sepulveda Transit Corridor Project in the amount of \$26,221,895 for the four-year base term, and \$14,440,545 for the two-year option term, for a total contract value of \$40,662,440, subject to resolution of protest(s), if any; and
- B. APPROVE Contract Modification Authority in the amount of 10% of the contract award value and authorize the CEO to execute individual Contract Modifications within the Board-approved Contract Modification Authority.

**Attachments:** [Attachment A - Procurement Summary Sepulveda PMSS](#)  
[Attachment B - DEOD Summary](#)  
[Presentation](#)

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26. **SUBJECT: ANNUAL PROGRAM EVALUATION FOLLOW UP - EARLY INTERVENTION TEAM PROGRAM ADVANCEMENT** [2022-0565](#)

**RECOMMENDATION**

RECEIVE AND FILE status report in response to Board directed actions leading to the establishment of the Early Intervention Team (EIT).

**Attachments:** [Attachment A - EIT Initial Project Phase Assessment Presentation](#)

27. **SUBJECT: PROGRAM MANAGEMENT QUARTERLY CHANGE REPORT** [2022-0668](#)

**RECOMMENDATION**

RECEIVE AND FILE Status Report on Program Management Quarterly Change Report.

**Attachments:** [Attachment A - Change Order Log](#)  
[Attachment B - OIG Spot Check CEO Delegated Authority Delays Avoided](#)

28. **SUBJECT: PROGRAM MANAGEMENT MAJOR PROJECT STATUS** [2022-0686](#)

**RECOMMENDATION**

RECEIVE AND FILE Program Management Major Project Status Report.

**Attachments:** [Attachment A - Program Management Major Project Status Report](#)

29. **SUBJECT: CALTRANS QUARTERLY UPDATE** [2022-0662](#)

**RECOMMENDATION**

RECEIVE quarterly oral report on the status of Caltrans' construction projects.

**Attachments:** [Presentation](#)

- SUBJECT: GENERAL PUBLIC COMMENT** [2022-0713](#)

RECEIVE General Public Comment

Consideration of items not on the posted agenda, including: items to be presented and (if requested) referred to staff; items to be placed on the agenda for action at a future meeting of the Committee or Board; and/or items requiring immediate action because of an emergency situation or where the need to take immediate action came to the attention of the Committee subsequent to the posting of the agenda.

**COMMENTS FROM THE PUBLIC ON ITEMS OF PUBLIC INTEREST WITHIN COMMITTEE'S SUBJECT MATTER JURISDICTION**

## Adjournment



## Board Report

File #: 2022-0652, File Type: Informational Report

Agenda Number: 24.

### CONSTRUCTION COMMITTEE OCTOBER 20, 2022

**SUBJECT: OFFICE OF THE INSPECTOR GENERAL  
CHANGE ORDER CONSTRUCTION SPOT CHECKS**

**ACTION: RECEIVE AND FILE**

#### **RECOMMENDATION**

RECEIVE AND FILE Office of the Inspector General Change Order Construction Spot Check Report for the period June 1 to August 31, 2022.

#### **ISSUE**

On January 25, 2018, the Metro Board directed the Office of the Inspector General (“OIG”) to conduct random spot checks on change orders for the projects listed in the quarterly program management report to ensure that the CEO Delegation of Authority to approve Construction Change Orders Policy is performing in the manner desired by the Board of Directors.

#### **BACKGROUND**

The OIG’s Construction Change Order Spot Check Program (“Spot Checks”) focuses on approved change orders and modifications that exceed \$500,000. The four change orders in this report were selected from the Program Management Quarterly Major Project Status, Legistar 2022-0668. The OIG gathers the data, reviews all the change orders over \$500,000 and selects change orders from the major projects. The information for the Spot Checks was collected from the Program Management Information System (PMIS) which is the department’s database system. Also, TEAM meetings and telephonic interviews were conducted with Metro Program Management, Project Control, and Procurement staff from each involved project office.

For each Spot Check we summarize:

- Description of the change order,
- Change order detail,
- Scope of Work,
- Budget,
- Schedule (Time to execute the change order),
- Safety, and
- Recommendations (lessons learned are identified starting with this report).

Metro’s Program Control department has provided informal responses to this report before its



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issuance and are asked to provide written responses to the recommendations in this OIG Spot Checks Report within 30 days after this Report is issued. Included with this Report is a spreadsheet on the status of responses concerning former OIG Spot Check Report recommendations.

## **DISCUSSION**

### **Spot Checks Performed in this Quarter**

#### **Spot Check #1 - Regional Connector Transit Corridor Project -**

This OIG Spot Check report concerns the Regional Connector Transit Corridor Project - (Contract C0980 MOD-0239), Additional AT&T Duct bank Installations at 2nd Street - Construction.

#### **Change Order Detail**

See Attachment A Spot Check #1 chart.

#### **Summary #1**

**Scope of Work** - This change order (MOD 0239) is to extend the work limits beyond the station boundary extending into Broadway and Spring Streets and construct new AT&T duct banks. In 2014, AT&T developed engineering plans, which were approved by City of Los Angeles, for the 2nd and Broadway Streets Station, under the Regional Connector contract. In 2020, the contractor and Metro determined the communication lines could not be constructed as planned because of numerous conflicting underground utilities and the existing communication vaults that were too small and in poor condition. Plans have now been re-developed to extend the duct bank beyond the station limits and extend into Broadway and Spring Streets. Pothole investigation will occur to determine feasible locations for the new communication vaults on Spring Street north of the Broadway Street intersection. Two communication vaults will be purchased on a separate change order.

**Budget** - This modification was negotiated, and the award amount is \$4,150,000. The Contractor's proposal was \$5,349,197 and the ICE was \$4,275,427. The difference in price is \$1,199,197 (-22.4%) under the contractor's proposal. The negotiated amount was \$125,427 (-2.9%) under the ICE. Staff stated that funds for this change are within the recently amended Life-of-Project budget.

**Schedule** - The CEO Delegation of Authority process was utilized for this modification. The Contractor and Metro agreed on the Scope of Work on July 29, 2022. The modification including the price, was awarded on August 17, 2022, and was completed in 14 workdays. Under the prior Board approval method for change orders, assuming a September Board meeting date, it would have taken a total of 39 workdays to complete the transaction.

**Safety** - Regional Connector has 7,417,605 project hours through June 2022 with a Recordable Injury Rate of 0.73 (Bureau of Labor Statistics the National Average is 2.4) and a Days Away, Restricted or Transferred (DART) of 0.00 (Bureau of Labor Statistics National Average is 1.5).

**Recommendation** -The OIG acknowledges the unknown underground site condition of numerous conflicting underground utilities, but the existing AT&T communication vaults that were both too small and in poor condition may or may not have been known prior to the beginning of contract. It should be noted that AT&T did not initially provide design or informational requests for new vaults and now Metro is creating a change order to pay the contractor for an oversight on the utility's behalf.

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The OIG recommends, as a **Lesson Learned**, during project planning Metro should ask the Utility company to acknowledgement that all vaults, duct banks, and utility lines conform to current specifications and are in satisfactory condition. It is prudent for Metro to be aware of the utilities condition before entering into a construction contract.

### **Spot Check #2 - Division 20 Portal Widening and Turnback Project**

This OIG Spot Check report concerns the DIV 20 Portal Widening and Turnback Project (Contract C1136 CO-0017.4/MOD 0037), 1<sup>st</sup> Street Bridge Continuous Monitoring.

### **Change Order Detail**

See Attachment A Spot Check #2 chart.

### **Summary #2**

**Scope of Work** - This change order is to provide continuous electronic survey monitoring of all movements of the 1<sup>st</sup> Street Bridge during major construction impacts. At multiple locations across the bridge, instrumentations were set up to read at set intervals, monitor, and report the bridge movement. Alerts are sent to Metro, City of Los Angeles, Engineer of Record, and the Contractor when movement exceeds set thresholds.

The change order for monitoring movement was first established as CO-0017.0 for \$234,600 in February 2021; it was increased to \$1,131,306 in CO 17.1 and increased again to \$1,831,306 in CO 17.2 and then was superseded by CO 17.3 for \$2,110,000 this amount included all the prior changes. The Contractor submitted a cost and schedule proposal in December 2021 for this work. A final agreement on the scope of work occurred in May 2022 and MOD 37 was created for an agreed upon price of \$3,465,238. The Contractor is refusing to sign the modification (MOD 37) with Metro. Therefore, Metro has issued a unilateral change order (CO 17.4) totaling \$3,465,238; the Contractor is allowed to invoice hours and materials each month until the \$3,465,238 is exhausted. The use of unilateral change orders is not uncommon but Metro has been put in a position to issue a unilateral because the contractor refuses to sign a modification. This sum covers the total charges for the instrumentation and monitoring of the bridge movements (as stated previously). The agreed amount has been projected for work to occur out to June 2023, using the remaining balance of \$1,355,238 (this is the difference between CO 17.3 and CO 17.4) to have continuous monitoring until all bridge construction impacts are complete. This construction and monitoring will be complete when the demolition of the affected portion of the bridge supporting structure is removed.

**Budget** - Four Not To Exceed (“NTE”) change orders plus this final unilateral change order totals \$3,465,238. This modification was negotiated, but the contractor refused to sign the modification and the project office chose to issue a unilateral change order. The Contractor’s proposal was \$3,624,429 and the ICE was \$3,114,343. The difference in price is \$159,191 (-4.4%) under the contractor’s proposal. The negotiated amount was \$350,895 (11.3%) over the ICE. Staff stated that funds for this change are within the recently amended Life-of-Project budget.

**Schedule** - The CEO Delegation of Authority process was utilized for this modification. The Contractor and Metro agreed on the Scope of Work on May 27, 2022. The unilateral change order was awarded on July 26, 2022, and was completed in 41 workdays. Under the prior Board approval method for change orders, assuming an August Board meeting date (no July meeting), it would have

taken a total of 63 workdays to complete the transaction.

**Safety** - DIV 20 Project has 545,997 project hours with a Recordable Injury Rate of 0.73 (Bureau of Labor Statistics the National Average is 2.4) and a Days Away, Restricted or Transferred (DART) of 1.5 (Bureau of Labor Statistics National Average is 1.5).

**Recommendation** - As was recommended in the prior quarterly construction change orders spot check report, the OIG recommends the issue of liability for sub-contractors claims and bonds be resolved so that it is not necessary to use NTE change order methods, and further change orders follow the standard Metro construction practices and procedures.

### **Spot Check #3 - Airport Metro Connector Transit Station**

This OIG Spot Check report concerns the Airport Metro Connector Transit Station (Contract C1197 MOD 009), Bulletin 16 - Light Rail Transit (LRT) Fence Updates.

### **Change Order Detail**

See Attachment A Spot Check #3 chart.

### **Summary #3**

**Scope of Work** - This change order (MOD 009) regards changes to the stainless-steel fencing at the Airport Metro Connector station. The contract drawings were revised at Metro's request to increase the capacity of the fence to resist seismic and wind loads by reducing the weight of the fence.

To accomplish this, the width between fence posts and the support assembly were shortened. The footing size and the post depth into the footing was modified. Additionally, the stainless-steel thickness was reduced and a different finish to the surface both lightened the weight. Even though the heaviness of the fence was reduced, the cost increased because of the current raw material shortage escalated the price.

**Budget** - This modification was negotiated, and the award amount is \$2,319,894. The Contractor's proposal was \$2,858,617 and the ICE was \$2,116,833. The difference in price is \$538,723 (-18.8%) under the contractor's proposal. The negotiated amount was \$203,061 (9.6%) over the ICE. Staff stated that funds for this change are within the Life-of-Project budget.

**Schedule** - The CEO Delegation of Authority process was utilized for this modification. The Contractor and Metro agreed on the Scope of Work on June 9, 2022. The modification was awarded on August 9, 2022, and completed in 43 workdays. Under the prior Board approval method for change orders, assuming an August Board meeting date, it would have taken a total of 55 workdays to complete the transaction.

**Safety** - The Airport Metro Connector Transit Station Project has 129,560 project hours with a Recordable Injury Rate of 1.54 (Bureau of Labor Statistics reports the National Average is 2.4) and Days Away, Restricted or Transferred (DART) of 0.00 (Bureau of Labor Statistics reports the National Average is 1.5). Note that this project has not reached 1 million hours and the data can only be properly interpreted after project reaches necessary hours.

**Recommendation** - The OIG recommends Metro consider updating Metro Rail Design Criteria

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(MRDC) and necessary specifications to reflect current 2022 California Seismic standards and future requests for proposals to build better and be prepared for future earthquakes. This may be considered a **Lesson Learned**.

#### **Spot Check #4 - Purple Line Extension Section 1 Transit Project**

This OIG Spot Check report concerns the Purple Line Extension Section 1 Transit Project (Stations Contract C1045 MOD 159), Track Level Access Openings at Wilshire/Western, Wilshire/La Brea and Wilshire/ La Cienega.

#### **Change Order Detail**

See Attachment A Spot Check #4 chart.

#### **Summary #4**

**Scope of Work** - This modification is to provide three temporary structural openings in the tunnel shaft to provide efficient and safe access for new building materials, removal of tunnel boring machine (TBM) bearings, and cutterheads. Previous access was provided from the Division 20 rail yard through the tunnel using the tracks to Wilshire/Western station. That access will no longer be allowed as construction advances towards completion of the turnback project at the Division 20 rail yard. The three locations at Wilshire and Western (10-ft x 10-ft), Wilshire and La Brea (14-ft x 32-ft), and Wilshire and La Cienega (15-ft x 40-ft) will be designed and constructed by the Contractor. This change order is out of the scope of the contract because of delays associated with the TBM's due to anomalies at Wilshire and San Vicente. These temporary openings in the station exterior walls will mitigate construction delays associated with the roof, concourse, and entrance of the stations.

**Budget** -. These modifications were negotiated, and the award amount is \$5,487,903. The Contractor's proposal was \$7,147,417 and the ICE was \$5,200,824. The award amount was \$1,659,514 (-23.2%) under the contractor's proposal. The negotiated amount was \$287,079 (5.5%) over the ICE. Staff stated that funds for this change are within the approved amended Life-of-Project budget.

**Schedule** - The CEO Delegation of Authority process was utilized for this modification. The Contractor and Metro agreed on the Scope of Work on May 27, 2022. The modification was awarded on June 30, 2022, and was completed in 24 workdays. Under the prior Board approval method for change orders, assuming an August Board meeting date, it would have taken a total of 63 workdays to complete the transaction.

**Safety** - Purple Line Extension 1 Project has 7,316,693 project hours with a Recordable Injury Rate of 1.09 (Bureau of Labor Statistics reports the National Average is 2.4) and Days Away, Restricted or Transferred (DART) of 0.08 (Bureau of Labor Statistics reports the National Average is 1.5).

**Recommendation** - none.

#### **FINANCIAL IMPACT**

This report will have no financial impact on the Agency beyond what is described above.

### Impact to Budget

For all of the construction change orders reviewed, Metro states the funds are within the approved budget and will utilize the contingency funds to cover the costs from the LOP budget.

- Spot Check #1) \$4,150,000 Regional Connector Transit Corridor Project
- Spot Check #2) \$3,465,238 DIV 20 Portal Widening & Turnback Project
- Spot Check #3) \$2,319,894 Airport Metro Connector Transit Station
- Spot Check #4) \$5,487,903 Purple Line Extension Section 1 Project

The OIG was informed that the contractor on spot check #2 refuses to sign modifications because the Metro standard modification form says Metro will not pay the sub-contractor's bond cost. Therefore, Metro has decided to issue a unilateral change order to avoid over use of NTE's. The disagreement concerning the modification form language should be resolved.

### EQUITY PLATFORM

In the opinion of the OIG, we considered whether these change orders presented any equity related issues on their face. There are a few locations downtown in the Regional Connector project at Alameda and 1<sup>st</sup> Street in China Town and Division 20 railroad yard that are within or adjacent to Equity Focus Communities (EFC's). There are 20-ft high sound walls around the construction worksites to protect residential communities and office suites from the nuisance of construction noise. The OIG did not receive any data concerning other community impacts. Each of the contractors are striving to have work performed by Disadvantage Business Enterprises (DBE) typically at 12-15% implementation, for these change orders at these EFC sites. The OIG observed no obvious disparate impacts created by these change orders on small businesses, low-income persons, or by the performance of the work in a manner that impacted a disadvantaged community beyond what is typical and usual when conducting any construction.

### IMPLEMENTATION OF STRATEGIC PLAN GOALS

The Office of Inspector General reviews large change orders over a calendar quarter and makes recommendations as appropriate to support Metro's Strategic Plan Goal #5: Provide responsive, accountable, and trustworthy governance within the Metro organization and CEO goals to exercise fiscal discipline to ensure financial stability. The OIG mission includes reviewing expenditures for fraud, waste, and abuse in Metro programs, operations, and resources. For each selected change order reviewed, the OIG evaluates whether there are red flags of fraud, waste, or abuse taking place. We report the details of the significant change orders and make recommendations consistent with the OIG's Construction Best Practices report dated February 29, 2016, more particularly focusing on lessons learned, improving efficiencies, and prudent spending.

### NEXT STEPS

The OIG shall provide every quarter, an ongoing spreadsheet of recommendations to Program Control and Program Control. Program Control and Program Management agrees to respond to the recommendations of the OIG within 30 days. The OIG continues to meet periodically to discuss reports, recommendations, and the status of implementation of the recommendations with Project

Management, and receive updates. The list of OIG recommendations and Metro management responses is an attachment to this OIG report (Attachment B).

**ATTACHMENTS**

Attachment A - Change Order Details for Spot Checks

Attachment B - Tracking Sheet of OIG Recommendations and Responses to last quarter

Attachment C - Power Point for October 2022 Construction Spot Checks

Prepared by: Prepared by: Suzanna Sterling, Construction Specialist Investigator, (213) 244-7368

Reviewed by: Karen Gorman, Inspector General, (213) 244-7337



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Karen Gorman  
Inspector General

**Spot Check #1 – Regional Connector Transit Corridor Project - Contract C0980****Change Order Detail**

<u>Description of Modification or Change Order - MOD-0239</u> Additional AT&T Ductbank Installations at 2nd Street – Construction	
<u>Change Order Dates:</u>	
Scope of Work approved	July 29, 2022
Modification Executed	August 17, 2022
<u>Elapsed Time for Executing Change Order:</u>	
Using new delegated process	14 workdays
Estimate using former Board approval process Agenda for the <i>September</i> Board	39 workdays
<u>Cost of Change Order:</u>	
Metro independent cost estimate (ICE)	\$4,275,427
Contractor's proposed cost	\$5,349,197
Negotiated amount	\$4,150,000
Percentage of negotiated amount <i>UNDER</i> ICE	-2.9%
Amount negotiated less than the Contractor's proposal	\$1,199,197

**Spot Check #2 - Division 20 Portal Widening Turnback Project - Contract C1136****Change Order Detail**

<u>Description of Modification or Change Order – CO-0017.4 / MOD 0037</u> First Street Bridge Continuous Monitoring	
<u>Change Order Dates:</u>	
Scope of Work approved	May 27, 2022
Unilateral Issued No Modification Executed	July 26, 2022
<u>Elapsed Time for Executing Change Order:</u>	
Using new delegated process,	41 workdays
Estimate using former Board approval process Agenda for the <i>August</i> Board (no July Board)	63 workdays
<u>Cost of Change Order:</u>	
Metro independent cost estimate (ICE)	\$3,114,343
Contractor's proposed cost	\$3,624,429
Negotiated amount	\$3,465,238
Percentage of negotiated amount <i>OVER</i> ICE	11.3%
Amount negotiated less than the Contractor's proposal	\$159,191

**Spot Check #3 - Airport Metro Connector Transit Station - Contract C1197****Change Order Detail**

<u>Description of Modification or Change Order – MOD-009</u> Bulletin 16 – Light Rail Transit (LRT) Fence Updates	
<u>Change Order Dates:</u>	
Scope of Work approved	June 9, 2022
Unilateral Executed	August 9, 2022
<u>Elapsed Time for Executing Change Order:</u>	
Using new delegated process	43 workdays
Estimate using former Board approval process Agenda for the <i>August</i> Board (no July Board)	55 workdays
<u>Cost of Change Order:</u>	
Metro independent cost estimate (ICE)	\$2,116,833
Contractor's proposed cost	\$2,858,617
Negotiated amount	\$2,319,894
Percentage of negotiated amount <i>OVER</i> ICE	9.6%
Amount negotiated less than the Contractor's proposal	\$538,723

**Spot Check# 4- Purple Line Section 1 Transit Project – Stations Contract C1045****Change Order Detail**

<u>Description of Modification or Change Order – MOD 159</u> Track Level Access Openings at Wilshire/Western, Wilshire/La Brea and Wilshire/ La Cienega	
<u>Change Order Dates:</u>	
Scope of Work approved	May 27, 2022
Not To Exceed amount issued No Modification Executed	June 30, 2022
<u>Elapsed Time for Executing Change Order:</u>	
Using new delegated process	24 workdays
Estimate using former Board approval process Agenda for the <i>August</i> Board (no July Board)	63 workdays
<u>Cost of Modification:</u>	
Metro independent cost estimate (ICE)	\$5,200,824
Contractor's proposed cost	\$7,147,417
Negotiated amount	\$5,487,903
Percentage of negotiated amount <i>OVER</i> ICE	5.5%
Amount negotiated less than the Contractor's proposal	\$1,659,514



ATTACHMENT B (October 2022)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
<p>October 2022 #1 Contract C0980 MOD-0239 Regional Connector Transit Corridor Project - Additional AT&amp;T Duct bank Installations at 2nd Street – Construction</p>	<p>The OIG acknowledges the unknown underground site condition of numerous conflicting underground utilities, but the existing AT&amp;T communication vaults that were both too small and in poor condition were known prior to the beginning of contract. It should be noted that AT&amp;T did not initially provide design or informational requests for new vaults and now Metro must create a change order and pay the contractor for an oversight on the utility's behalf.</p> <p>The OIG recommends, as a Lesson Learned, that in project planning for Metro to ask the utility company to acknowledgement that all vaults, duct banks, and utility lines conform to current specifications and are in satisfactory condition. It is prudent for Metro to be aware of the utilities condition before entering into a construction contract.</p>		
<p>October 2022 #2 Contract C1136 CO-0017.4/MOD 0037 Division 20 Portal Widening and Turnback Project - 1st Street Bridge Continuous Monitoring</p>	<p>As was recommended in the prior quarterly construction change orders spot check report, the OIG recommends the issue of liability for sub-contractors claims and bonds be resolved so that it is not necessary to use NTE change order methods, and further change orders follow the standard Metro construction practices and procedures.</p>		
<p>October 2022 #3 Contract C1197 MOD-009 Airport Metro Connector Transit Station Bulletin 16 – Light Rail Transit (LRT) Fence Updates</p>	<p>The OIG recommends Metro consider updating Metro's design criteria and necessary specifications to reflect current 2022 California Seismic standards in the MRDC and future requests for proposals to build better and be prepared for future earthquakes. This may be considered a lesson learned.</p>		
<p>October 2022 #4 Contract C1045 MOD 0159 Purple Line Ext. Sect. 1 Track Level Access Openings at Wilshire/Western, Wilshire/La Brea and Wilshire/ La Cienega</p>	<p>None</p>		

ATTACHMENT B (August 2022)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
August 2022 #1 Contract C1136 MOD-0029 Division 20 Portal Widening and Turnback Project - Time Extension for MOD-20 Addl Scope and Addl Requirements for DIV 20	The OIG recommends, that all future construction contracts include a capped amount per day to pay the contractor when Metro stops critical path construction work or contractor incurs significant delays due to unforeseen causes.		
August 2022 #2 Contract C1136 CO-0011.3 Division 20 Portal Widening and Turnback Project - 1st Street Viaduct - Crack and Spall Repair	1) The OIG recommends that the scope of work should be agreed upon as soon as possible.  2) The OIG recommends the issue of liability for sub-contractors claims and bonds be resolved, and further change orders follow the standard Metro construction practices and procedures. We further recommend that the language concerning bonds and sub-contractors in the Metro standard forms for modification/change orders be moved to the Metro standard contract terms and conditions.		
August 2022 #3 Contract C1120 CO-0041 Purple Line Ext. Sect. 2 Tunneling Suspension Associated with Abandonment of Oil Wells	The OIG recommends Metro consider implementing Unilateral change orders when the contractor is claiming compensation for delays greater than the contract cap permits.		
August 2022 #4 Stations Contract C1152 CO-0035.1 Purple Line Ext. Sect. 3 VA Steam Tunnel Size Increase and Redundancy	Now that the cost schedule proposal (CSP) has been received, the OIG recommends that the Contractor's CSP be thoroughly evaluated to finalize the change order to enter into an agreed upon modification to replace working on a NTE basis as soon as possible.		

ATTACHMENT B (April 2022)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
April 2022 #1 Contract C0988 MOD-0551 Crenshaw/LAX Transit Corridor Project Landscape Changes – Park Mesa	none		
April 2022 #2 Contract C0980 MOD-00230 Regional Connector - Transit Corridor Project Alameda Emergency Stair Exit (ES2)	The OIG recommends in-house plan review be as fully completed as possible before Metro groups sign off on the design plans.	The project team agrees with OIG and does have both project staff and Metro staff provide reviews for all plans. This change originated with the change in FLS requirements within the Wye which was identified after award of contract.	
April 2022 #3 Contract C1045 MOD-0144 Purple Line Extension Sect. 1 Construction LaCienega Station During Mining	none		
April 2022 #4 Contract C1045 MOD-0147 Purple Line Extension Sect. 1 Vapor Extraction Street Restoration	none		

ATTACHMENT B (January 2022)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
January 2022 #1 Contract C0980 MOD-00218 Regional Connector - Transit Corridor Project Metro Eastside Access Improvement Project "Segment 2" Esplanade and other improvements along Alameda Street – Construction Only	none		
January 2022 #2 Contract C1136 CO-00020.2 Division 20 Portal Widening and Turnback Project Differing Site Conditions - Connections to Existing Ductbanks and Unknown Utilities Impacts	The OIG recommends that Metro continue to track the time and materials used by the contractor while negotiating the Contractor's cost and schedule proposal and to bring this change order to a final award amount.	Final award amount for CO-00020.2 has been reached. Negotiations with the Contractor (TPC) consisted of multiple workshops to reach agreement on rates of production, activity duration, labor, materials and equipment required, complexity of the work. Since agreement on these items was challenging, Metro made a business decision to start with the contractor's estimate and deduct items that were not allowed in the contract. A final settlement for CO 20 was reached at \$43.3M, approximately \$10M under the contractor's original estimate. A time delay for changes related to CO 20 in the amount of \$6M, or 6 months at \$1M per month, has also been agreed upon for these changes.	Substantial Completion and commissioning of the turnback track is scheduled for late Fall of 2024 to coincide with Revenue Operations of PLE1. Final project completion could be as much as a year later.
January 2022 #3 Contract C1120 CO-00034 Purple Line Extension Sect. 2 Century City Constellation Station Storm Drain and Sanitary Sewer Relocation Construction of MOD 70 Design	none		
January 2022 #4 Contract C1152 MOD-0007 Purple Line Extension Sect. 3 Replacement Parking at VA Hospital Lot 42 During Station Construction	The OIG recommends that the Contractor be instructed to timely submit cost proposals, enter negotiations, and sign agreements before work is performed so Metro can process the work order close in time to work being performed, not only to pay the contractor but to help ensure the sub-contractors are paid timely.	No Comments	

ATTACHMENT B (October 2021)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
<p>October 2021 #1 Contract C0980 MOD-00206 Regional Connector - Transit Corridor Project Add Wye Junction Fan Plant - Construction</p>	<p>Since the Board approved of a budget for this item in 2015 at \$12 mil., the cost has increased to a total of \$21,186,000 (a 77% increase). This Fan System cost has been reported in pieces, as parts were completed, but not as a whole to indicate the cost creep overall over time. We recommend that when LOP information is being periodically provided to the Board that it includes a summary, per project, to show historical cost information over the life of each project. That summary should indicate if they anticipate completing the project within the current LOP and how many LOP increases have occurred so far.</p>	<p>The initial board item in 2015 for the fan plant was an ROM at the time and had yet to be fully designed and estimated for a complete change. As the project progressed the design and went into construction, the team worked through the negotiations for the full scope of the fan plant. As of now, there has only been one LOP increase and the project has anticipated that the project would fall within the LOP to date. Project team will work with Program Management leadership on how information is reported and follow Program Management's direction for any changes on how LOP is reported.</p>	
<p>October 2021 #2 Contract C1136 MOD-00020 Division 20 Portal Widening and Turnback Project Additional Scope and Additional Requirements for the Division 20 Portal Widening and Turnback Project</p>	<p>The OIG recommends: 1. When Metro needs to expedite a project, include Operations in the initial planning phase early, prior to and during design so they can provide constant input during the design. 2. Explore with Operations if they need additional resources to dedicate full time to assist in the intense design, planning, and implementation pre-opening phases of Metro's rail infrastructure/capital projects, or other ways in which Program Management and Operations can work together to approach these projects to maximize cooperation, communication, and assistance. 3. Have the Legal Department review our designer contracts to determine if they are adequate to hold contractors accountable, enforceable, and require use of bonds and proof of adequate insurance to cover errors of this type and resulting in cost of this magnitude.</p>	<p>1. Project alignments were revised during planning phase to accommodate additional storage capacity and technical requirements required for turnback headways. As design progressed, Operations participated in frequent design review meetings. 2. Additional Operations resources during design phases would be beneficial and help produce more comprehensive reviews. 3. Project team is coordinating with County Counsel on review of designer contracts.</p>	
<p>October 2021 #3 Contract C1045 MOD-0 137 Purple Line Extension Sect. 1 Increased Well Maintenance at Western Shaft due to Groundwater Chemistry Impacts</p>	<p>see #4 for recommendation</p>		
<p>October 2021 #4 Contract C1045 MOD-00138 Purple Line Extension Sect. 1 Additional Dewatering Treatment and Discharge Impacts at Western</p>	<p>The OIG recommends that all dewatering change orders for this project should be evaluated or audited. The Geotechnical Baseline Report issued by the consultant to Metro was not accurate for the soil type, ground water, and hydrogen sulfide levels for each segment of Purple Line Section 1 and the consultant might be held liable for some of the costs of differing site conditions not correctly determined by the consultant. Unplanned dewatering site conditions also cost Metro \$15.8 mil. at the La Brea Station and \$16.8 mil. at the La Cienega Station in 2020 and 2019 respectively.</p>	<p>The dewatering MODs for WPLE-1 have been already been evaluated as part of the CN process. In order to minimize the potential for future DSCs on other Projects, consideration should be undertaken to expend more resources during Preliminary Engineering (PE) to more accurately project the actual conditions encountered. The costs of additional PE should be weighed against the increased base bid prices, or future Change Order costs if no additional PE efforts are undertaken. Valid additional costs to Metro, via the base bid or Change Order, will be incurred either way. It is premature at this time to hold the PE Consultant liable for all or a portion of the costs of this MOD.</p>	

ATTACHMENT B (July 2021)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
July 2021 #1 Contract C0980 MOD-00196 Regional Connector - Transit Corridor Project Construct the 2nd & Broadway Station Overbuild Load Transfer System	none		
July 2021 #2 Contract C0980 MOD-00202 Regional Connector - Transit Corridor Project Revise Communications Radio System Scope of Work- Construction	The OIG recommends that after installation of the new radio system that interface with Los Angeles fire, police and sheriff departments be tested and verified for their signal strength and connectivity.	Agreed, all radio systems will be fully tested and verified for signal strength and connectivity	
July 2021 #3 Contract C1045 MOD-0131 Purple Line Extension Sect. 1 Wilshire/Fairfax Station Subgrade Differing Site Conditions	The OIG recommends that after a DRB issues its recommendations that favor the contractor, Metro act swiftly to move forward with a change notice to the contractor and not delay payment to the contractor, less any credits owed to Metro. We understand in this particular case the contractor assigned a lower priority for processing this change notice over many others.	In this case there was no requirement for Metro to issue a Change Notice due to the DRB ruling. The Contractor (STS) chose to delay providing Metro with a cost proposal associated with the DRB ruling due to other higher Contractor priorities. After the eventual receipt of the DRB ruling proposal from the Contractor, the costs were negotiated, and a MOD issued (w/o any Change Notice being created). It should be noted that whether a Change Notice is issued or not, the Contractor has the right to submit a proposal whenever and for whatever they perceive as changed work (via a Request for Change). Section 1 has and continues to issue Change Notices in a timely manner when Metro recognizes merited changed scope of work.	
July 2021 #4 Contract C1152 MOD-0014 Purple Line Extension Sect. 3 Revisions to Westwood/UCLA Station Entrances – Design Only	none		

ATTACHMENT B (April 2021)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
April 2021 #1 Contract C0988 MOD-00253.3 Crenshaw/LAX Transit Corridor Project Landscape Changes – Park Mesa	The OIG recommends that we identify quickly the differences in cost between the new scope of work from the contract and finalize plans and the cost with the prime Contractor.	-Agree and recommendation will be incorporated into C/LAX Project Lessons Learned. -C0988 Contract Team has started to identify the differences in cost between the new scope of work from the contract. Additionally, new scope of work will only be processed if it is a safety related change.	
April 2021 #2 Contract C0980 MOD-00188 Regional Connector - Transit Corridor Project 2nd/Hope Pedestrian Bridge - Construction	no recommendation concerning this change order		
April 2021 #3 Contract C1120 MOD-0095 Purple Line Extension Sect. 2 Station and Bicycle Parking, Architectural Features Design and Construction Changes at Wilshire/Rodeo & Century City Constellation Stations	The OIG recommends that Purple Line, Section 3, be immediately evaluated to determine if the MRDC architectural updates and the Metro bike hub system changes have been incorporated into the Purple Line Extension Section 3 Transit project. This will ensure consistency, compliance with the MRDC, and cost assessments to be determined and negotiated at the earliest possible time.	Purple Line Sect #2 response: Noted.  Purple Line Sect #3 response: The WPLE3 contract included the latest MRDC requirements for bike hubs at both stations at time of bid, which minimized changes to the WPLE3 contract.	
April 2021 #4 Contract C1120 MOD-0095 0100 Purple Line Extension Sect. 2 Century City Constellation Main Entrance - Construction	The large cost disparities between the ICE and a Contactor's proposal on high dollar transactions should continue to prompt further technical and commercial evaluation in order to arrive at a fair and reasonable price. The OIG recommends that the ICE be evaluated by the Estimating department to further evaluate the significant differences between the Contractor's proposal and their independent estimate utilizing both technical and commercial evaluation.	ESTIMATING response: Metro Estimating will review the ICE and CSP and work with V/CM and Project Management staff to evaluate the differences.  Purple Line Sect #2 response: Project staff will continue to involve Estimating staff in scoping discussions to ensure that they have a full understanding of the scope of work for all Change Work.	

ATTACHMENT B (January 2021)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
<p>January 2021 #1 Contract C0980 MOD-00184 Regional Connector - Transit Corridor Project Expanded Duco Yard and Temple Street Sanitary Sewer Work</p>	<p>The OIG recommends that future contracts with the designer should include verification of sewers identified as abandoned, and to document the verification on the construction drawings if the cost of such verification is minor and the consequences of reliance on erroneous information is significant. Additionally, the OIG recommends that the as-built record drawings at the City be updated.</p>	<p>Planning and engineering need to rely on as-built records for much of their work. However, where key utilities are involved, it is best that their condition and status be validated during the preliminary design phase. This investigation is often expensive and not easily performed without site investigation. The engineer must use his/her judgement to determine which utilities require physical investigation and inspection. Project budget contingency should be set aside for utility discrepancies that may be discovered during construction. Agree that even minor utilities, improperly documented, can have a significant cost and/or schedule impact to a project and should be investigated early, to the extent possible. The City is the best entity to ensure that underground maps are complete.</p>	<p>No further action from Regoinal Connector as project design has already been completed. However, efforts are continually made to perform potholing investigations for verificatoin prior to construction so as to avoid impacts to schedule should discrepancies be found.</p>
<p>January 2021 #2 Contract C1045 MOD-00121 Purple Line Extension Sect. 1 Alternate Soil Disposal</p>	<p>California laws, including Senate Bill 1383 of 2016 set mandatory targets to reduce waste going to landfills. Metro developed a recycling policy (GEN 51) in response to State recycling goals and to support Metro's sustainability goals. The Conditional Use Permit for the Chiquita Canyon Landfill was set to expire and the Landfill operator sought a new permit, which was granted in July, 2017. The new permit requirements limits the rate of tonnage of dumping allowed, hours of operation, and the county set other multiple requirements that Chiquita Canyon must adhere. The OIG recommends:</p> <ol style="list-style-type: none"> <li>1. Construction waste disposal options are utilized to minimize project costs and to help achieve the reduction goal of a 75% reduction in waste by 2025;</li> <li>2. Project teams work very closely with the Metro Sustainability Department, State, Los Angeles County, other regulators, landfill owners, and contractor's personnel, to determine options consistent with GEN 51 for the reuse of soils and construction debris in the current or other construction sites;</li> <li>3. When a Board member has a matter come before them at their respective municipalities that can potentially effect Metro projects, if they would give notice to Metro of the matter, Metro can determine how its projects will be impacted and possibly address the matter with the municipality or 3rd party prior to the matter being approved including possibly negotiate that the terms of a permit not allow price increases or other impacts on Metro projects where contractual commitments have previously been negotiated in reliance on previous conditions;</li> <li>4. LA Metro evaluate how other LA Metro projects for which a contract was entered may be impacted by the newly imposed landfill mitigations and higher fees.</li> </ol>	<p>Metro acknowledges the recommendations listed and provides the following responses below:</p> <ol style="list-style-type: none"> <li>1. Per contract, the project must divert/recycle 75% of waste. Purple Line Section 1 has diverted 100% of excavated clean material on the project to be reused as beneficial cover or fill at offsite projects.</li> <li>2. The Purple Line Section 1 project has a member of the Metro Environmental Compliance and Sustainability Department (ECSD) on staff. This team member updates project management and contractors on opportunities to reduce waste impacts as they become available across the county.</li> <li>3. Acknowledged</li> <li>4. ECSD management will review awarded projects and available facilities and make recommendations on where to make changes to disposal practices as needed.</li> </ol>	
<p>January 2021 #3 Contract C1120 MOD-0091 Purple Line Extension Sect. 2 Increase UPS Spare Capacity at Wilshire Rodeo and Century City Constellation Stations</p>	<p>The OIG recommends that immediately prior to sending out an RFP, Metro should insure that the most current MRDC is used.</p>	<p>In this case, the updated MRDC Section 8 was added to the RFP near the end of the solicitation period, but conflicts with other contract documents were not identified because of the late issuance of the update. Staff agree that all future changes to the MRDC should be coordinated by Metro Engineering and issued before future RFPs are released.</p>	



ATTACHMENT B (January 2021)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
January 2021 #4 Contract C1152 CO-0005.1 Purple Line Extension Sect. 3 VA Hospital Replacement Parking for Lot 42 During Station Construction Phase	The OIG recommends that the Project office and Real Estate continue to work closely and aggressively to come to a full resolution with the VA hospital and the contractor on the modified costs.	Agree	

ATTACHMENT B (October 2020)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
<p>October 2020 #1 Contract C0988 MOD-00485 Crenshaw/LAX Transit Corridor Project Case 5 Bedding Required by LABOE</p>	<p>Since the 'Green book' states the support and materials for sewer and storm drain pipe are to be encased in concrete, the OIG recommends that the LA Metro rail standard drawing US-014, be updated to reflect the required City standard and Metro may negotiate with the LABOE to adopt a different standard for specific projects as warranted.</p> <p>We further recommend, as discussed in previous reports, that Metro study the large discrepancies between the Metro ICE and the award amounts to determine if there is a method by which those discrepancies can be narrowed. This recommendation applies to many of the Spot Checks reviewed in this Report, and is based also on a Metro audit completed by the Management Audit Services Department that noted significant discrepancies in these amounts to be a frequent occurrence.</p>	<p>Recommendation will be incorporated into C/LAX project Lessons Learned.</p>	
<p>October 2020 #2 Contract C1045 MOD-00111 Purple Line Extension Sect. 1 Fairfax Paleo Zone Modified Limits</p>	<p>The OIG recommends future GBR's include a more comprehensive underground site assessment to determine a better approximation of the marine and paleo geological layers. In this instance, a robust underground assessment would have avoided the costly change order. However, the additional excavation costs would have been included in the higher base bid value.</p>	<p>Recommendation will be incorporated into PLE1 project Lessons Learned.</p>	
<p>October 2020 #3 Contract C1120 MOD-00080 Purple Line Extension Sect. 2 Demobilization and Remobilization due to COBH Moratorium</p>	<p>The MOA between Metro and COBH imposes additional restrictions on Metro and adds costly change orders to the original contract.</p> <p>The OIG recommends Metro adopts a standardized MOA for use in negotiations with all jurisdictions within Los Angeles County and utilizes this agreement for every construction project going forward in each respective jurisdiction and that budget estimates for projects should be revised as necessary to take into consideration MOAs entered into.</p>	<p>Agreed.</p>	
<p>October 2020 #4 Contract C1151 MOD-0004.1 Purple Line Extension Sect. 3 Increase Ground Water Treatment Plant Capacity at Tail Track Exit Shaft</p>	<p>It is the OIG's understanding that water pump tests and water quality tests were performed, but they were performed at the original location, the Army Reserve site, which is no longer the correct shaft location. Now the site is at the Veterans Administration property. A change in location can greatly affect both the levels and quality of the groundwater, thus increasing the revised dewatering process.</p> <p>It is critical that the Real Estate Department be included at the earliest possible time in negotiating the property requirements for a project. Having to change location plans after a contract award can have significant scheduling and expense consequences.</p>	<p>The location of the Tail Track Exit Shaft had to move from an environmentally cleared site occupied by the Army reserve site to the US Department of Veterans Affairs West Los Angeles campus when it became evident that the US Army Reserve was unwilling to allow the use of this location for either construction laydown or a permanent Metro Facility. Metro Real Estate and Project staff successfully negotiated with the Department of Veterans Affairs to enable relocation of this construction laydown area and permanent facility to their West Los Angeles Campus.</p>	

ATTACHMENT B (October 2020)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
<p>October 2020 #5 Contract C1151 MOD-0005 Purple Line Extension Sect. 3 Addition of Sepulveda Staging Area to Compensate VA Site Reduction</p>	<p>The Purple Line Extension 3 was a 'next decade project' and was accelerated to be completed in the next 5 years with many project processes that had to be compressed to meet the schedule. We also understand that the real estate acquisition process is contingent on the funding being in place.</p> <p>The real estate acquisition process and all other real estate arrangements must be negotiated as early as possible and negotiate those property rights strategically to ensure we have our real estate needs met at the earliest and least expensive manner possible.</p>	<p>The space available for staging at the Tail Track Exit Shaft on the Department of Veterans Affairs Campus is limited; being located in a nationally designated historic district. Metro Real Estate and Project Staff have and are working closely together, in a timely manner to ensure real estate acquisitions are coordinated with project need dates to minimize overall risk and cost to Metro in delivering the project.</p>	

ATTACHMENT B (August 2020)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
August 2020 #1 Contract C1045 MOD-00095 Purple Line Extension Sect. 1 Transit Project: Phase 5 Golder EOR Mitigation Plan Implementation	<p>The OIG is in agreement with applying extra safety precautions that the Metro project office has put forward. Where conditions are relatively unique to the tunneling industry, more prescriptive specifications for means and methods in these zones is warranted.</p> <p>Since the Contractor, Golder Gas, performed the entire mitigation plan including removal and mitigation, the OIG recommends that LA Metro ensure that Golder Gas is held contractually, jointly, and severally liability for any future incident involving gas in the area where the soil vapor extraction wells and the monitoring wells are installed and abandoned. This is the common practice in environmental cases where a "consulting expert" is hired to monitor and mitigate a hazardous substance issue.</p>	<p>The Section 1 Project will review the indemnification text issued to Golder that was required by STS in order for Golder to proceed with the work. This indemnification will determine what Golder's future obligations are.</p>	
August 2020 #2 Contract C1045 MOD-00106 Purple Line Extension Sect. 1 Center Muck Shaft at La Brea (ECI-03)	<p>The OIG recognizes that this type of shaft at the La Brea station can serve a legitimate purpose and that the OIG recommends that use of such methods should be considered and contemplated in future project specifications and a reserve for same should be made when the savings in time, expense, and safety outweigh the cost of such a shaft.</p>	<p>OIG comment received will be included in the lessons learned.</p>	
August 2020 #3 Contract C1045 MOD-00107 Purple Line Extension Sect. 1 Center Muck Shaft at La Brea (ECI-03)	<p>The OIG is concerned that a bid of 40% over an ICE, when you are in a noncompetitive circumstance, may not be a good faith offer or bad communication on specifications. Such behaviors can have the effect of damaging a relationship during an early phase of construction and create distrust that can harm project collaboration in the future. We appreciate a contractor's willingness to proceed on work even without a commitment from Metro in some cases for the payment for that work, but recommend the contractor exercise greater care in formulating its proposals and that Metro be clear and fair but diligent and firm in its ICE calculations and negotiations stance.</p>	<p>OIG comment received. Contractor will be reminded to have appropriate personell attend the fact finding and provide timely complete CSP in order to resolve issues in a collaborative manner.</p>	

ATTACHMENT B (August 2020)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
<p>August 2020 #4 Contract C1120 MOD-00073 Purple Line Extension Sect. 2 Century City Constellation Station Track work Extension</p>	<p>1. The OIG is concerned that a bid is almost 3 times over the ICE, when you are in a noncompetitive circumstance, may not be a good faith offer or bad communication on specifications. Such behaviors can have the effect of damaging a relationship during an early phase of construction and create distrust that can harm project collaboration in the future. We appreciate a contractor's willingness to proceed on work even without a commitment from Metro in some cases for the payment for that work, but recommend the contractor exercise greater care in formulating its proposals and that Metro be clear and fair but diligent and firm in its ICE calculations and negotiations stance.</p> <p>LA Metro is having to absorb the cost of track extension change orders that arose due to errors and omissions on the part of the engineering consultant WSP. The OIG was informed that WSP miscalculated the braking distance in the initial project definition drawings that were supplied to the construction contractor. Metro will have to cover this expense with the contractor, but should look to the design engineering firm for reimbursement to Metro of the costs it would not have had to otherwise incur less amounts saved or mitigations.</p> <p>2. The OIG additionally recommends that Metro review the current Metro Rail Design Criteria (MRDC) compared to the newly released FRA track design standards for accommodating a train entering a stub-end to determine if any modification or update to our MRDC is warranted.</p>	<p>1. If a Cost and Schedule Proposal (CSP) is significantly higher than the Independent Cost Estimate (ICE), Metro's Contract Administrator and the Project Team engages in further meetings with the Contractor to clarify scope in order to determine the source of the discrepancies between the two estimates. These meetings are professional in nature, and often result in favorable resolution on a price that is somewhere between the ICE and the revised CSP. This process ultimately leads to the execution of mutually agreed upon Contract Modifications, and avoids costly disputes related to Changed Work.</p> <p>Related to the cost of the change, if WSP had calculated the braking distance correctly, the Contractor's proposal price would have included the cost for the trackwork that was recently added by Contract Modification. As a result, the awarded contract value would have been slightly higher, and the project contingency slightly lower at Notice to Proceed. The only additional cost that this error by WSP may have created is a theoretical premium for paying for added trackwork in a non-competitive environment, which would be difficult to prove. It should be noted that the difference between the executed Contract Modification price and the ICE was about 17%, or \$171,000. As a result, it is likely that it would be difficult for Metro to determine if it paid a non-competitive premium. That said, the recommendation will be discussed with senior executive management in VCM and Program Management to determine if any action against WSP will take place.</p> <p>2. This recommendation will be referred to Metro Engineering for consideration.</p>	

ATTACHMENT B (April 2020)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
<p>April 2020 #1 C0980 MOD-00161 Regional Connector - Procure Medium Attenuation Fasteners in Lieu of Standard Direct Fixation Rail Fasteners for the 2nd &amp; Broadway Crossover</p>	<p>Regional Connector project is very unique because of all the existing historical buildings above the construction. Noise pollution has become a major concern for urban transit dwellers and authorities. The rule of thumb is a 10decibel technical increase in noise is heard by the human ear as "doubled" in loudness. When constructing underground for tunnels and stations the Environmental Impact Report must remember to always mitigate sound and vibration to protect the potentially impacted fragile surface buildings.</p> <p>The OIG recommends this scenario be written into the Lessons Learned file for future similar situations when constructing under historic or special case existing buildings.</p>	<p>The Regional Connector Project has extensive vibration mitigation elements included in the design where the operating guidway passes nearby sensitive receptors including recording studios, music venues and hotels. The project also requires that noise and vibration monitoring be performed during construction near sensitive facilities.</p> <p>The lesson learned and responded to in the referenced Contract Modification, is that information gathered during construction monitoring should be used to adjust the designed mitigations where field conditions indicate they are necessary.</p>	<p>Completed with issuance of subject contract modification. Equipment to be installed 3rd quarter 2020</p>
<p>April 2020 #2 C1045 MOD-00098 Purple Line Sect. 1 Additional Air Scrubbers at Fairfax Station</p>	<p>The OIG recommends further questioning to Southern California AQMD to determine why on a previous Metro construction contract (at the same location) they set the emission limit at 50 parts per billion, and the published standards are set at an emission limit of 30 parts per billion. On this contract the limits are set at 15 parts per billion. The inconsistency of the emissions limit should be taken under consideration and request in writing from AQMD why the standard emission limit could not be applied to this permit.</p> <p>The OIG further recommends in future construction pre-bid meetings, disclose to all potential contractors that the AQMD permit values necessary for the technical specification, "Temporary Construction Ventilation for Scrubber Units" has varied in the recent past and to verify the amount with an AQMD representative. If possible a commitment needs to be obtained from AQMD by the contractor at the time of submission of a bid amount, that the standard is firm for a defined period.</p>	<p>The emissions limit for equipment was set at the time the Contractor submitted the specific ventilation plan to SCAQMD for permit.</p> <p>The SCAQMD does not have a set standard for hydrogen sulfide, but the states standard is 30 parts per billion. SCAQMD develops their requirements based on specific site conditions. Our EIR states Metro and its contractors will set and maintain work equipment and standards to meet SCAQMD standards.</p> <p>A letter will be sent to SCAQMD for clarification on how SCAQMD can consistently apply emissions regulations for hydrogen sulfide for Metro's future projects.</p>	
<p>April 2020 #3 C1120 MOD-00064 Purple Line Sect. 2 Geotechnical Instrumentation Installation and Monitoring AT&amp;T and Beverly Hills High School</p>	<p>The OIG recommends that the independent estimator visit the field location concerning where the work for this change order will occur. The construction manager should walk the estimator through the scope of the changes for which they are developing a cost estimate. The independent estimate was a 126.7% lower than the negotiated price. Where such significant discrepancies in price estimates exist, either the estimator for Metro, or the estimator for the contractor needs to re-evaluate the scope of the change order.</p>	<p>Agreed. Moving forward the estimating group will endeavor to work even more closely with available subject matter experts to assure a thorough understanding of scope and of the engineering and construction processes involved.</p>	
<p>April 2020 #4 C1151 MOD-00001 Purple Line Sect. 3 Revise the Tail Track Exit Shaft Location from US Army Reserv to Veterans Affairs Property</p>	<p>If the Army Reserve location had been negotiated prior to the contract award, these amounts might have been included in the original bid, although the price then and now might have been the same for this different location.</p> <p>The OIG recommends Real estate arrangements should be negotiated as early as possible.</p>	<p>Metro agrees with the OIG's comment regarding the price of the change. The cost would roughly be the same whether it was negotiated prior to contract award or after award. We agree that real estate arrangements (agreements) should be negotiated as early as possible. The project initiated contact with the property owner for the Exit Shaft property acquisition after the project was identified to be accelerated from the original 2035 Revenue Service Date. Metro did engage in talks with the VA early in the Project but obtaining VA approval to access their property has not been without a few challenges that Metro was able to overcome.</p>	

ATTACHMENT B (January 2020)

OIG REPORT/ SPOT CHECK # MOD #	RECOMMENDATIONS	MANAGEMENT'S RESPONSES	COMPLETION DATE
Jan 2020 / #1 C0988-MOD-00437 Crenshaw/LAX UG1 (H2S) Ventilation Fans - Construction	none		
January 2020 #2 C0980 MOD-00154 Regional Connector - Acoustical Treatments for Areas Not on Finish Schedule	none		
January 2020 #3 C1045 MOD-00089 Purple Line Sect. 1 Development and On Site Validation of the Selected Gas Mitigation Option for M13	<p>While the soil at every site is unique, it is possible to create a standard for testing soils for gasses. There is no current rule or technical specification within Metro criteria for extraction of CH<sub>4</sub> or H<sub>2</sub>S from the soil.</p> <p>The OIG recommends after the final report is submitted by the contractor, that a technical specification for testing be developed and written into the MDRC to use in the future.</p>	<p>PLE1 Final M13 Mitigation Report will be forwarded to Metro Geotechnical Department for their review and further processing.</p>	
January 2020 #4 C1045 MOD-00090 Purple Line Sect. 1 Oil Well Investigation In Lieu of TBM Probe Ahead	<p>The implementation of the drilling and magnetometer survey from Section 1 has been incorporated into Purple Line Extension Section 2 and 3 contracts.</p> <p>The OIG recommends that the procedures implemented for locating tanks, pipes and other abandoned waste be added to the Lessons Learned database.</p> <p>The OIG further recommends that Metro evaluates whether to pursue recovery for waste removal costs under CERCLA (Comprehensive Environmental Response, Compensation, and Liability Act, also known as Superfund. Passed in 1980). The OIG recommends that Metro's Engineering Program Management provide information on this matter to Metro's Legal department to assist in making this determination and potentially pursuing this recovery.</p>	<p>PLE1 implemented methodologies for locating known tanks, pipes and other abandoned waste will be added to the Lessons Learned database. PLE1 notes that the hazardous waste removal is relatively small/negligible compared with the overall volume of soil removed. After reviewing the potential ROI on pursuing legal actions against any potential responsible parties for cost recovery the current determination based on the available data is that it is not worth the effort and cost at this time. However, <b>it was decided that Metro County Counsel would provide a preliminary review on the issue and it would be revisited in the future.</b></p>	

# Office Of Inspector General Construction Change Order Spot Check Report

Presented By  
**Karen Gorman**  
Inspector General

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October 2022

Construction Committee

Los Angeles County Metropolitan Transportation Authority





# Spot Checks 1 & 2

## 1 - **Regional Connector**- - Addl. AT&T Duct bank Installations at 2nd Street – Construction.

Award: **\$4,150,000**

### ***Recommendation:***

The OIG recommends, as a **Lesson Learned**, during project planning Metro should ask the Utility company to acknowledgement that all vaults, duct banks, and utility lines conform to current specifications and are in satisfactory condition. It is prudent for Metro to be aware of the utilities condition before entering into a construction contract

## 2 - **Division 20** - - 1<sup>st</sup> Street Bridge Continuous Monitoring.

NTE: **\$1,355,238 increase for total of \$3,465,238**

### ***Recommendation:***

As was recommended in the prior quarterly construction change orders spot check report, the OIG recommends the issue of liability for sub-contractors claims and bonds be resolved so that it is not necessary to use NTE change order methods, and further change orders follow the standard Metro construction practices and procedures.

# Spot Check 3 & 4

File #  
2022-0652

**3 - Airport Metro Connector Transit Station - - Bulletin 16 - Light Rail Transit Fence Updates**  
Award: **\$2,319,894**

***Recommendation:***

The OIG recommends Metro consider updating Metro Rail Design Criteria (MRDC) and necessary specifications to reflect current 2022 California Seismic standards and future requests for proposals to build better and be prepared for future earthquakes.  
This may be considered a **Lesson Learned**.

**4 - Purple Line Sect. 1 - - Track Level Access Openings at Wilshire/Western, Wilshire/La Brea and Wilshire/ La Cienega**  
Award: **\$5,487,903**

***Recommendation:***

None

# Spot Check Schedule Comparison

Schedule Comparison: new delegated process vs. former Board approval process

PROJECT	Title of Change Order	Time Saved Executed date to Board Mtg.	NEW Delegated Process final SOW to Executed date	Former Board Approval Process
REGIONAL CONNECTOR	Additional AT&T Duct bank Installations at 2nd Street – Construction.	25	14	39
DIVISION 20 PORTAL WIDENING & TURNBACK PROJECT	1 <sup>st</sup> Street Bridge Continuous Monitoring.	22	41	63
AIRPORT METRO CONNECTOR	Bulletin 16 – Light Rail Transit (LRT) Fence Updates	12	43	55
WESTSIDE PURPLE LINE EXT. SECT 1	Track Level Access Openings at Wilshire/Western, Wilshire/La Brea and Wilshire/ La Cienega	39	24	63



Board Report

File #: 2022-0529, File Type: Contract

Agenda Number: 25.

**REVISED**  
**CONSTRUCTION COMMITTEE**  
**OCTOBER 20, 2022**

**SUBJECT: SEPULVEDA TRANSIT CORRIDOR PROJECT**

**ACTION: APPROVE RECOMMENDATIONS**

**RECOMMENDATION**

AUTHORIZE the Chief Executive Officer (CEO) to:

- A. AWARD AND EXECUTE Contract No. AE82658000 to Anser Advisory Management, LLC for Program Management/Pre-Development Agreement (PDA) Oversight Services for the Sepulveda Transit Corridor Project in the amount of \$26,221,895 for the four-year base term, and \$14,440,545 for the two-year option term, for a total contract value of \$40,662,440, subject to resolution of protest(s), if any; and
- B. APPROVE Contract Modification Authority in the amount of 10% of the contract award value and authorize the CEO to execute individual Contract Modifications within the Board-approved Contract Modification Authority.

**ISSUE**

On January 18, 2022, Metro issued a Request for Proposals (RFP No. AE82658) seeking a Program Management/Pre-Development Agreement Oversight Services Contractor (PM/PDAOSC) to assist the Program Management Department in managing and supporting the delivery of the Sepulveda Transit Corridor Project (Project). The performance period shall be a period of four (4) years, with an option for an additional two (2) years. Board approval is needed to award Contract No. AE82658000 to allow the contractor to begin work and provide oversight over the two PDA contractors. Approval of this contract supports the advancement of the Pre-Development Agreement (PDA) process.

**BACKGROUND**

Metro is environmentally clearing a new fixed-guideway transit project running between the San Fernando Valley (“Valley”) and Los Angeles International Airport (“LAX”), through the Westside of Los Angeles (“Westside”). The section of Interstate 405 (“I-405”) between these high-demand areas

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remains one of the most congested urban freeway corridors in the United States. More than 400,000 people move through this area every weekday. Much of this crowding is a result of the geography of the area and the limited number of roads and public transport options running north-south through the Santa Monica Mountains.

To address the need for additional transportation capacity, the initial phase of the Project, if approved, would connect the San Fernando Valley to West Los Angeles (“Valley to Westside”) and ultimately extend a final project phase south to LAX (“Westside-LAX Extension”). Each project phase is included in Metro’s Measure M Expenditure Plan, which specifies delivery of the Valley to Westside project phase by 2033-35 and delivery of the Westside to LAX project phase by 2057-59.

### Pre-Development Agreement Approach

A pre-development agreement (PDA) is a form of early contractor involvement where a private project developer participates in early project definition and design in partnership with the project owner. PDA contractors provide technical work products, including cost estimates, constructability reviews, technical analyses, etc. that support the ongoing development of a project as it progresses through the environmental review and approval processes.

In July 2019, the Board approved a finding that using a PDA approach pursuant to Public Utilities Code Section 130242 will achieve certain private sector efficiencies in the integration of the planning, design, and construction of the Project (file 2019-0490).

The PDA project development period includes clear phases and milestones, which occur in parallel with, but separate from, the preparation of environmental documents to satisfy the requirements of NEPA and CEQA. In each phase, a PDA contractor advances the design of its proposed alternatives at Metro’s direction, considering public and stakeholder feedback received by Metro through the environmental process.

Metro is currently considering six project alternatives in addition to the No Build alternative. These alternatives are:

- Alternative 1: Monorail with aerial alignment in Interstate 405 (I-405) corridor and electric bus connection to UCLA
- Alternative 2: Monorail with aerial alignment in Interstate 405 (I-405) corridor and aerial automated people mover connection to UCLA
- Alternative 3: Monorail with aerial alignment in Interstate 405 (I-405) corridor and underground alignment between the Getty Center and Wilshire Bl
- Alternative 4: Heavy rail with underground alignment south of Ventura Bl and aerial alignment generally along Sepulveda Bl in the San Fernando Valley
- Alternative 5: Heavy rail with underground alignment, including along Sepulveda Bl in the San Fernando Valley
- Alternative 6: Heavy rail with entirely underground alignment, including along Van Nuys Bl in the San Fernando Valley and southern terminus station on Bundy Dr

The PDA contractors are designing alternatives 1 through 5, and Alternative 6 is being designed by the environmental consultant’s design team under a separate contract.

After the Board establishes a Locally Preferred Alternative (LPA) for the Project, which is anticipated to occur at the end of PDA Phase 3, Metro may elect to continue pre-development work with a PDA contractor if the Board selects its proposed alternative as the LPA. At that point, the other PDA contract would expire. Alternatively, Metro could terminate both PDA contracts and proceed with the alternative developed by the design team of the environmental consultant or approve the no-build alternative.

If the Board selects as the LPA a PDA team's alternative, then during PDA Phase 4, the selected PDA contractor will advance the engineering of the selected mode, configuration, and alignment to a level of detail necessary to submit an Implementation Proposal.

## **DISCUSSION**

With the significant size and aggressive implementation schedule for delivering Metro's Sepulveda Transit Corridor Project, Metro requires a Contractor to assist the Program Management Department in managing and supporting the delivery of the Project.

The Contractor shall serve as advisors, managers, and support as an extension of Metro technical staff, as needed. The Contractor will assist in the oversight and completion of ongoing and future work associated with the planning and management of the Project. Metro will provide overall direction for the Project and assign its personnel to perform specific job responsibilities. The Contractor shall be able to scale its workforce to accommodate the estimated needs of this highly dynamic Project on an annual basis.

Due to the potential variability in program requirements, the scope and labor hours for the Contractor shall be based on each Task Order. Metro shall have the sole discretion in defining and making changes in positions and tasks assigned to the Contractor. Given the need to oversee two large PDA contractor teams, the oversight services team may need to scale up or down and exercise flexibility and agility in its approach. Also, additional oversight and review needs may arise, given the innovative approaches proposed by the two PDA contractors.

## **EQUITY PLATFORM**

The Sepulveda Transit Corridor is consistent with the Metro Equity Platform in that the alternatives help address accessibility for residential and employment centers, support for transit-oriented communities' policies, support for first/last-mile connections, and investment in disadvantaged communities. The project will provide a much needed connection from the underserved area of the San Fernando Valley to employment opportunities in Westside. Going forward, the Project will use the 2022 working definition of Equity Focus Communities neighborhood designation along with other metrics as appropriate to guide analyses and to conduct robust community engagement.

The selected firm made an SBE commitment of ~~25.09~~22.52% and a DVBE commitment of 3.96%. This commitment exceeds the DEOD goal of 22% SBE and 3% DVBE included in the RFP.

### **DETERMINATION OF SAFETY IMPACT**

These actions will not have any impact on the safety of Metro customers and/or employees because this project is in the planning process phase and no capital or operational impacts result from this Board action.

### **FINANCIAL IMPACT**

The amount of \$5,950,000 was requested in the FY23 budget in Project 460305 (Sepulveda Transit Corridor) in Cost Center 8510 to assist the Program Management Department in managing and support the Program Management/Pre-Development Agreement Oversight Services for the Sepulveda Transit Corridor Project. This is a multi-year project requiring expenditure authorizations in fiscal year increments until a Board Authorized Life of Project Budget is adopted. It is the responsibility of the Cost Center Manager, Project Manager, and Chief Program Management Officer to budget for this project in the future fiscal years and within the cumulative contract limits.

#### **Impact to Budget**

The Sepulveda Transit Corridor Project is included in Metro's current Long Range Transportation Plan (LRTP), as approved by the Metro Board in 2020, which is consistent with the Measure M expenditure plan approved by LA County voters in 2016. Funding for the Project in the Expenditure Plan is divided into three phases with approximately \$9.7 billion in total funding (2015 dollars). Phase 1, with \$260 million in funding, includes the implementation of Metro ExpressLanes on the I-405 between the 10 and 101 Freeways with an opening date of Fiscal Year (FY) 2026. Phase 2, with approximately \$5.7 billion in funding, includes a fixed-guideway transit service between the San Fernando Valley and the Westwood area of Los Angeles, with an opening year of FY 2033 to 2035. Phase 3, with approximately \$3.8 billion in funding, involves extending the Phase 2 project southward to LAX, with an opening year of FY 2057 to 2059.

These funds are earmarked for the Sepulveda Transit Corridor project and are not eligible for Metro bus and rail capital and operating expenditures.

### **IMPLEMENTATION OF STRATEGIC PLAN GOALS**

The Sepulveda Transit Corridor Project will support the first goal of the Vision 2028 Metro Strategic Plan by providing high-quality mobility options that enable people to spend less time traveling. Travel times are forecast to be less than 30 minutes for Valley-Westside (from the Ventura County Metrolink Line in the north to the Expo Line in the south), and less than 40 minutes for Valley-Westside-LAX (from Metrolink to the Crenshaw/LAX Line). This performance is highly competitive with travel by car on the I-405 freeway.

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The project will also support the strategic plan's goals by enhancing communities and lives through mobility and access to opportunity by adding a new high-quality mobility option, closing a gap in the rail network that provides outstanding trip experiences and enhances communities and lives through mobility and access to opportunity.

### **ALTERNATIVES CONSIDERED**

The Board could choose not to approve any or all of the recommendations. This is not recommended as this work is necessary to provide oversight over the two PDA contractor teams and maintain the Measure M delivery schedule.

### **NEXT STEPS**

Upon Board approval, staff will execute Contract No. AE82658000 with Anser Advisory Management, LLC to provide Program Management/Pre-Development Agreement (PDA) Oversight Services for the Sepulveda Transit Corridor Project.

### **ATTACHMENTS**

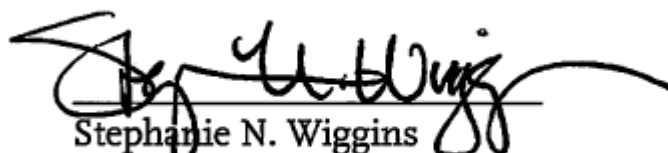
Attachment A - Procurement Summary

Attachment B - DEOD Summary

Prepared by: Kavita Mehta, Deputy Executive Officer, Program Management, (213) 435-5047  
Debra Avila, Deputy Chief Vendor / Contract Management Officer, (213) 418-3051

Reviewed by:

Bryan Pennington, Chief Program Management Officer, Program Management, (213) 922-7449



Stephanie N. Wiggins  
Chief Executive Officer



## PROCUREMENT SUMMARY

## PROGRAM MANAGEMENT/PRE-DEVELOPMENT AGREEMENT OVERSIGHT SERVICES FOR SEPULVEDA TRANSIT CORRIDOR PROJECT / AE82658000

1.	<b>Contract Number:</b> AE82658000	
2.	<b>Recommended Vendor:</b> Anser Advisory Management, LLC	
3.	<b>Type of Procurement (check one):</b> <input type="checkbox"/> IFB <input type="checkbox"/> RFP <input checked="" type="checkbox"/> RFP-A&E <input type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order	
4.	<b>Procurement Dates:</b>	
	<b>A. Issued:</b> January 18, 2022	
	<b>B. Advertised/Publicized:</b> January 18, 2022	
	<b>C. Pre-Proposal Conference:</b> February 1, 2022	
	<b>D. Proposals Due:</b> March 28, 2022	
	<b>E. Pre-Qualification Completed:</b> August 10, 2022	
	<b>F. Conflict of Interest Form Submitted to Ethics:</b> March 31, 2022	
	<b>G. Protest Period End Date:</b> October 25, 2022	
5.	<b>Solicitations Picked up/Downloaded:</b> 204	<b>Bids/Proposals Received:</b> 4
6.	<b>Contract Administrator:</b> Manchi Yi	<b>Telephone Number:</b> (213) 418-3332
7.	<b>Project Manager:</b> Kavita Mehta	<b>Telephone Number:</b> (562) 524-0521

**A. Procurement Background**

This Board Action is to approve Contract No. AE82658000 for Program Management/Pre-Development Agreement (PDA) Oversight Services for the Sepulveda Transit Corridor Project. The Contractor shall serve as advisors, managers, and support as an extension of Metro technical staff. The Contractor will assist in the oversight and completion of ongoing and future work associated with the planning and management of the Sepulveda Transit Corridor Project. Board approval of contract award is subject to resolution of all properly submitted protest(s).

The Request for Proposal (RFP) was issued in accordance with Metro's Acquisition Policy and the contract type is a Firm Fixed Unit Rate. The RFP was issued with an SBE goal of 22% and DVBE goal of 3%.

Six amendments were issued during the solicitation phase of this RFP:

- Amendment No. 1, issued on January 21, 2022, revised the virtual pre-proposal conference date.
- Amendment No. 2, issued on February 3, 2022, provided revisions related to the Letter of Invitation.
- Amendment No. 3, issued on February 22, 2022, provided revisions related to the Scope of Services and extended the proposal due date and other critical dates.

- Amendment No. 4, issued on March 2, 2022, provided revisions related to the Letter of Invitation, Submittal Requirements and Scope of Services.
- Amendment No. 5, issued on March 14, 2022, extended the proposal due date and other critical dates.
- Amendment No. 6, issued on March 17, 2022, provided revisions related to the Scope of Services.

A virtual pre-proposal conference was held on February 1, 2022, attended by 143 participants representing 81 firms. A total of 73 questions were asked and responses were released prior to the proposal due date.

A total of 204 firms downloaded the RFP and were included on the planholders list. A total of four proposals were received by the due date of March 28, 2022, from the following firms, listed in alphabetical order:

- Anser Advisory Management, LLC
- Cordoba Corporation
- EXP U.S. Services Inc.
- Jacobs Engineering Group Inc.

## **B. Evaluation of Proposals**

A Proposal Evaluation Team (PET) consisting of staff from Metro’s Countywide Planning & Development, Office of Strategic Innovation, Program Management, Major Capital Project Engineering, and Program Control was convened and conducted a comprehensive technical evaluation of the proposals received.

The proposals were evaluated based on the following evaluation criteria and weights:

- |   |     |
|---|-----|
| • Experience, Qualifications, and Capabilities of Firms on the Team | 30% |
| • Experience, Qualifications, and Capabilities of Personnel         | 40% |
| • Understanding and Approach to Service Delivery                    | 30% |

The evaluation criteria are appropriate and consistent with criteria development for other, similar Architectural and Engineering (A&E) procurements. Several factors were considered when developing these weights, giving the greatest importance to experience, qualifications, and capabilities of personnel. The PET evaluated the proposals according to the pre-established evaluation criteria. This is an A&E, qualifications-based procurement; therefore, price cannot be used as an evaluation factor pursuant to state and federal law.

Beginning April 18, 2022, the PET members independently evaluated and scored the technical proposals. All four proposals were determined to be within the competitive range and were invited for an interview/oral presentation from May 19 to

May 25, 2022. Each firm had the opportunity to present each team’s qualifications and respond to the PET’s questions.

Following the interviews, the PET finalized the technical scores based on the written proposals and the interview/oral presentation. On June 2, 2022, the PET agreed that the final ranking of proposals scored Anser Advisory Management, LLC’s proposal as the highest technically qualified firm.

**Qualifications Summary of Recommended Firm:**

Anser Advisory Management, LLC (Anser) is a national capital program and project advisory firm offering solutions to public and private sector clients implementing capital projects and programs. Anser has a diverse team of professionals, including architects, engineers, construction managers, inspectors, project managers, estimators, certified professional accountants, management consultants, financial analysts, procurement specialists, system configuration specialists, and construction auditors. The Anser team has provided program management support services, including various P3 advisory services, to numerous campuses within the University of California system, including the UC Merced 2020 Project, UC Santa Cruz Student Housing West and UC Riverside design-build program. Anser’s proposed subconsultants have also provided engineering, design, and program management services on international projects in Canada and Australia. The Anser team also has construction management and advisory services experience working on the Los Angeles World Airport’s (LAWA) Automated People Mover and Consolidated Rent-A-Car Facility projects. Additionally, the team demonstrated their experience working and coordinating with third parties, such as FTA, FHWA, and CalTrans.

Anser is supported by 20 subcontractors that possess extensive experience in various project management and program management services, as well as technical areas such as tunneling, architecture, traffic engineering, utilities, geotechnical, civil engineering, mechanical, electrical, and plumbing, among others.

Anser’s proposed key positions have significant experience in all phases of project development, from planning studies and conceptual design; to environmental clearance, funding and delivery strategy; and program management, risk management and construction administration and have experience managing delivery of large transportation infrastructure projects including design-build, design-bid-build, and projects built to Caltrans, Federal Highway Administration (FHWA), Federal Transit Administration (FTA), and Federal Railroad Administration (FRA) standards and requirements. Additionally, the proposed key personnel have global experience in organizational development, alternative delivery, finance, and project delivery to bridge the gap between public and private sector interests.

A summary of the PET scores is provided below:

		<b>Average Score</b>	<b>Factor Weight</b>	<b>Weighted Average Score</b>	<b>Rank</b>
<b>1</b>	<b>Firm</b>				
<b>2</b>	<b>Anser Advisory Management, LLC</b>				
<b>3</b>	Experience, Qualifications, and Capabilities of Firms on the Team	<b>84.67</b>	<b>30%</b>	<b>25.40</b>	

4	Experience, Qualifications, and Capabilities of Personnel	83.25	40%	33.30	
5	Understanding and Approach to Service Delivery	87.68	30%	26.30	
6	<b>Total</b>		100%	85.00	1
7	<b>Jacobs Engineering Group, Inc.</b>				
8	Experience, Qualifications, and Capabilities of Firms on the Team	82.17	30%	24.65	
9	Experience, Qualifications, and Capabilities of Personnel	79.25	40%	31.70	
10	Understanding and Approach to Service Delivery	81.00	30%	24.30	
11	<b>Total</b>		100%	80.65	2
12	<b>Cordoba Corporation</b>				
13	Experience, Qualifications, and Capabilities of Firms on the Team	77.50	30%	23.25	
14	Experience, Qualifications, and Capabilities of Personnel	79.63	40%	31.85	
15	Understanding and Approach to Service Delivery	82.00	30%	24.60	
16	<b>Total</b>		100%	79.70	3
17	<b>EXP US Services, Inc.</b>				
18	Experience, Qualifications, and Capabilities of Firms on the Team	71.50	30%	21.45	
19	Experience, Qualifications, and Capabilities of Personnel	73.25	40%	29.30	
20	Understanding and Approach to Service Delivery	69.80	30%	20.94	
21	<b>Total</b>		100%	71.69	4

### C. Cost/Price Analysis

The recommended price of \$40,662,440 has been determined to be fair and reasonable based upon Project Manager's technical analysis, a cost analysis, fact finding, and negotiations.

	<b>Proposer</b>	<b>Proposal Amount</b>	<b>Metro ICE</b>	<b>Negotiated Amount</b>
1.	Anser Advisory Management LLC	\$45,789,741	\$34,328,393	\$40,662,440
		Base: \$29,314,821 Option: \$16,474,920	Base: \$22,885,595 Option: \$11,442,798	Base: \$26,221,895 Option: \$14,440,545

The Independent Cost Estimate (ICE) inadvertently did not include overhead rates as part of the estimate. Therefore, the ICE is lower than the negotiated amount.

Staff successfully negotiated a cost savings of \$5,127,301 for the Agency.

### D. Background on Recommended Contractor

The recommended firm, Anser Advisory Management, LLC (Anser), is headquartered in Santa Ana, California, with a local office in LA County, and has been in business for 26 years. Anser has project experience in project management, program management, project controls, and a variety of project

delivery methods. Anser has experience working with a variety of public sector agencies, including Metro. Anser has worked on Metro projects including Regional Connector and Division 20.

Of the 20 subcontractors who are members of the proposed team, 8 are Metro certified SBEs and one is DVBE certified; and 7 are located in Los Angeles County.

**DEOD SUMMARY**

**PROGRAM MANAGEMENT/PRE-DEVELOPMENT AGREEMENT OVERSIGHT  
SERVICES FOR SEPULVEDA TRANSIT CORRIDOR PROJECT / AE82658000**

**A. Small Business Participation**

The Diversity and Economic Opportunity Department (DEOD) established a 22% Small Business Enterprise (SBE) and 3% Disabled Veteran Business Enterprise (DVBE) goal for this solicitation. Anser Advisory Management, LLC exceeded the goal by making a ~~25.09~~22.52% SBE and 3.96% DVBE commitment.

<b>Small Business Goal</b>	<b>22% SBE 3% DVBE</b>	<b>Small Business Commitment</b>	<b><del>25.09</del><u>22.52</u>% SBE 3.96% DVBE</b>
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	<b>SBE Subcontractors</b>	<b>% Committed</b>
1.	Akima Consulting	1.96%
2.	Costin Public Outreach Group	1.67%
3.	DC Engineering Group	2.26%
4.	Enterris Associates	<del>8.70</del> <u>11.41</u> %
5.	Pacific Railway Enterprises, Inc.	<del>5.28</del> <u>1.88</u> %
6.	<del>Pacifica Services, Inc.</del>	<del>-1.88</del> %
76.	Spurlock Landscape Architects	1.34%
87.	UltraSystems Environmental, Inc.	2.00%
	<b>Total SBE Commitment</b>	<b><del>25.09</del><u>22.52</u>%</b>

	<b>DVBE Subcontractors</b>	<b>% Committed</b>
1.	Casamar Group	3.956%
	<b>Total DVBE Commitment</b>	<b>3.956%</b>

**B. Living Wage and Service Contract Worker Retention Policy Applicability**

The Living Wage and Service Contract Worker Retention Policy is not applicable to this modification.

**C. Prevailing Wage Applicability**

Prevailing wage is not applicable to this modification.

**D. Project Labor Agreement/Construction Careers Policy**

Project Labor Agreement/Construction Careers Policy is not applicable to this Contract. PLA/CCP is applicable only to construction contracts that have a construction related value in excess of \$2.5 million.



# Next stop: exploring alternatives to the 405.

## SEPULVEDA TRANSIT CORRIDOR PROJECT

RFP No. AE82658 Program Management/Pre-Development Agreement (PDA) Oversight Services for Sepulveda Transit Corridor Project  
Recommendation for Award



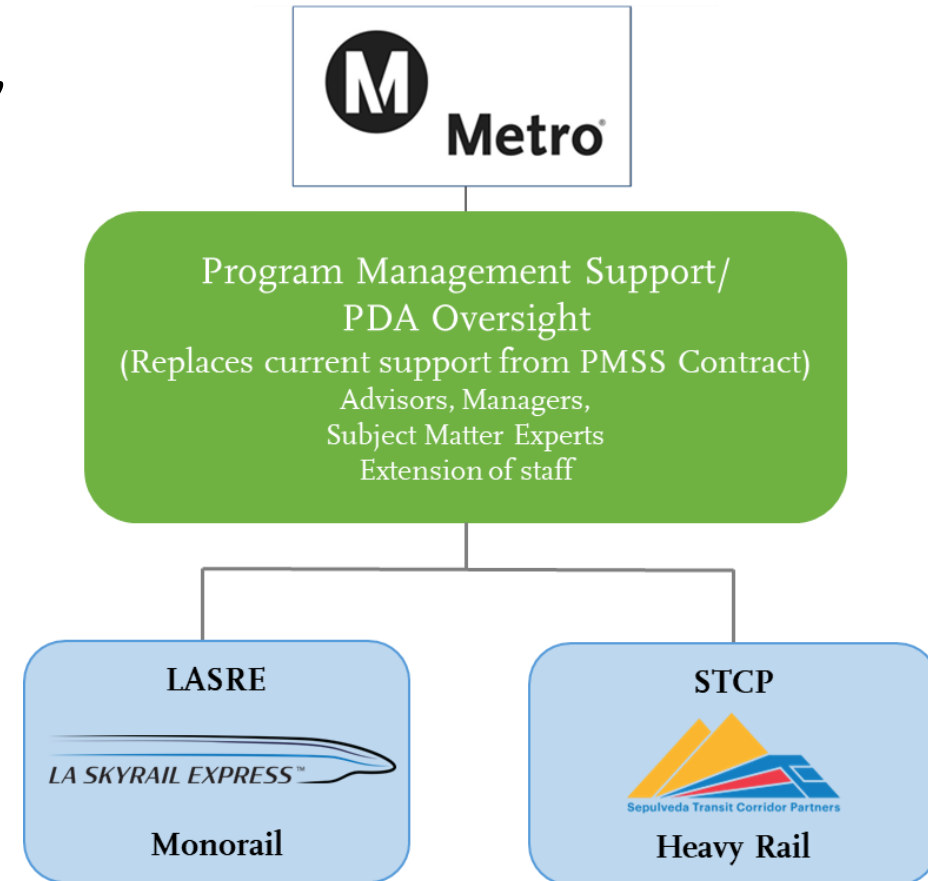
Metro®

October 2022



# Program Management/PDA Oversight Services

- > With the significant size and aggressive implementation schedule for delivering the Sepulveda Transit Corridor Project, Metro requires a Contractor to assist the Program Management Department in managing and supporting delivery of the Project
- > Contractor serve as advisors, managers, and support as an extension of Metro technical staff; will assist in the oversight and completion of ongoing and future work associated with the Sepulveda PDAs
- > Given the need to provide oversight over two large PDA contractor teams, the oversight services team may need to scale up or down and exercise flexibility and agility in their approach
- > Additional oversight and review needs may arise given the innovative approaches proposed by the two PDA contractors



# Evaluation Criteria and Final Evaluation Scores

Proposer	Experience, Qualifications, and Capabilities of Firms on the Team (30%)	Experience, Qualifications, and Capabilities of Personnel (40%)	Understanding and Approach to Service Delivery (30%)	Technical Score
Anser Advisory Management, LLC	25.40	33.30	26.30	<b>85.00</b>
Jacobs Engineering Group, Inc.	24.65	31.70	24.30	<b>80.65</b>
Cordoba Corporation	23.25	31.85	24.60	<b>79.70</b>
EXP US Services, Inc.	21.45	29.30	20.94	<b>71.69</b>

A Proposal Evaluation Team (PET) consisting of staff from Metro’s Countywide Planning & Development, Office of Strategic Innovation, Program Management, Major Capital Project Engineering, and Program Control was convened and conducted a comprehensive technical evaluation of the proposals received



# Recommended Proposer – Anser Advisory

## Proposal Highlights

- > The Anser Team brings a very qualified team of professionals and subconsultants that align with the innovative approaches from the PDA Teams to provide meaningful oversight of the PDA Teams; and demonstrated experience with a variety of program management, alternative delivery, and/or P3 projects.
- > The Anser Team has experience working on Metro projects (Regional Connector, Division 20)
- > Anser has provided P3 advisory services to numerous campuses within the University of California system, and construction management and advisory services to LAWA
- > Anser’s proposed subconsultants have provided engineering, design, and program management services on international P3 projects in Canada and Australia

## SBE and DVBE Goals and Commitment

	Goal	Anser Commitment
SBE	22%	22.52%
DVBE	3%	3.96%



# Recommendation

- > **AWARD AND EXECUTE** Contract No. AE82658000 to Anser Advisory Management, LLC for Program Management/Pre-Development Agreement (PDA) Oversight Services for the Sepulveda Transit Corridor Project in the amount of \$26,221,895 for the four-year base term, and \$14,440,545 for the two-year option term, for a total contract value of \$40,662,440, subject to resolution of protest(s), if any; and
- > **APPROVE** Contract Modification Authority in the amount of 10% of the contract award value and authorize the CEO to execute individual Contract Modifications within the Board-approved Contract Modification Authority.

# Thank You

## QUESTIONS?



## Board Report

File #: 2022-0565, File Type: Informational Report

Agenda Number: 26.

### CONSTRUCTION COMMITTEE OCTOBER 20, 2022

**SUBJECT: ANNUAL PROGRAM EVALUATION FOLLOW UP - EARLY INTERVENTION TEAM  
PROGRAM ADVANCEMENT**

**ACTION: RECEIVE AND FILE**

#### **RECOMMENDATION**

RECEIVE AND FILE status report in response to Board directed actions leading to the establishment of the Early Intervention Team (EIT).

#### **ISSUE**

In June 2022, Staff responded to Board requests related to the April 2022 Annual Program Evaluation (APE) presentation. In response to the June presentation, as shown below, Director Sandoval directed the CEO to develop an Early Intervention Project Team.

**SANDOVAL AMENDMENT:** *Direct the CEO to develop an Early Intervention Project Team comprised of Metro's finest and the best staff from planning, program management, operations, government relations, OMB, and vendor/contract management to create a list of a comprehensive checklist criteria on successful project delivery addressing such as (1) funding strategy (either it is local or federal project), (2) project delivery method and why the project is being recommended for such delivery method for all Measure M Expenditure Plan Projects.*

Implementation of this directive has been advanced with recognition of other related Board requested actions, including requests from Director Dupont-Walker to incorporate specific measures to ensure project scope growth is being managed and controlled during all phase of project delivery, as well as other requests related to future cost control efforts and reporting.

This October report provides a status update on the EIT initiative.

#### **BACKGROUND**

Los Angeles Metro is delivering the largest transportation infrastructure program in the country. The program is experiencing construction market pressures for labor and materials and the highest inflationary pressures in over forty years. The COVID-19 pandemic has exacerbated these issues, creating extreme volatility and implications regarding Metro's ability to deliver this ambitious capital

program.

Metro performs an Annual Program Evaluation (APE) for construction projects, providing a review of capital project current conditions, challenges, cost, schedule, and risk. Any changes to project budgets/schedules and reasons for adjustments are reported to the Board annually for approval. APE is a project management tool that brings greater consistency, transparency, and discipline to better manage and deliver Board-approved projects.

Prior to presentation of the FY23 APE, in February 2022, Metro staff presented a Construction Market Analysis (CMA) which laid out information on challenges related to our economy that would impact Metro's capital program. Metro staff then provided the FY23 APE report on April 21, 2022; wherein, they included data related to current cost and schedule forecast, funding availability, and mitigation measures for each project.

Following the report of the FY23 APE to the Construction Committee, Director Dupont-Walker requested staff respond to some specific items, including an item related to establishment of measures to control project scope growth during all phases of project delivery. Metro staff returned with a follow-up report to the Board in June 2022, addressing the items requested by Director Dupont-Walker.

In response to the June 2022 FY23 APE Follow-up Report, additional direction was received from both Director Sandoval and Director Dupont-Walker.

In accordance with the directive from Director Sandoval, Metro established an Early Intervention Team (EIT), which the Office of the CEO leads. In addition to the specific directive by Director Sandoval, when establishing team objectives and planned actions, the EIT has also considered other Board requests which also relate to cost control efforts to address the current challenges facing the capital delivery program.

## **DISCUSSION**

Over the years, Metro's capital projects have significantly increased in size and complexity. That change has affected, and will continue to affect, Metro's organizational approach to project development and delivery. This leads to an increased need for internal and external collaboration, cooperation, and communication. All Metro departments are involved in capital projects to a varying extent. The three departments with the most influence on project scope, cost, schedule, and risk are Planning, Program Management, and Operations. Respective roles and responsibilities transform through the project's lifecycle as project leadership shifts between departments.

The trend to larger projects increases the need for continuity of approach across the program and the life of each project. The success of a project increasingly requires the ongoing engagement of the Metro Board and external stakeholders. The continuity of project approach, including leveraging expertise from all departments in the stage gate process between key project phases, entails the commitment of appropriate resources and knowledge at each phase of the project. This level of engagement lays the foundation for an ongoing collaborative and integrated approach to an effective cost containment strategy for project development.

Formation and Establishment of the Early Intervention Team:

In line with directives received from the Metro Board members, the Chief Executive Officer assigned the Deputy Chief Executive Officer to lead the Early Intervention Team (EIT) initiative. The EIT kicked off their effort in July 2022 and has since been meeting regularly.

In line with the Board Directive, the EIT composition includes individuals from the Office of the CEO, Operations, Program Management, Countywide Planning, Office of Management and Budget, Vendor Contract Management, Government Relations, and Customer Experience. Representatives for each of the departments were chosen directly by Department Chiefs and Senior Leadership Team (SLT) members.

Structuring the team in this manner led to advancement of the effort in a holistic way that results in the following:

- Enhances teamwork across the full agency in the development of strategies to address the challenges facing the capital delivery program;
- Recognizes the role each department plays in the successful delivery of the projects while encouraging cross-department collaboration to address the full lifecycle needs of projects;
- Facilitates a framework whereby previous and related initiatives within each department can be validated and expanded to agency-wide initiatives; and
- Establishes a vehicle for direct engagement on project-focused reviews.

Early Intervention Team Objectives and Planned Actions:

To kick off the EIT initiative, the group identified and agreed upon overall objectives and selected planned actions to guide the team. These objectives envelope the Board directive related to the formation of the team, while also recognizing some more expansive goals related to the successful delivery of the capital program intended to align with other related Board items.

The overarching objectives of the EIT initiative include the following:

- Improve successful delivery of the capital program, with a focus on cost containment strategies and inter-departmental objectives;
- With the recognition of related efforts being advanced and implemented at Metro, this effort also considers and complements those existing agency programs;
- Advance an update of project forecasts, considering full lifecycle costs, in a manner that will enable the Chief Executive Officer and the Metro Board to assess and address the agency's ability to continue delivery of the planned capital projects with existing available resources.

In line with these objectives, team actions underway and planned in later stages include the following activities:

- Assessment of the primary cost drivers and corresponding mitigation actions which need to be considered for successful project delivery, including decision points related to funding strategies and delivery models;
- Update of project cost estimates, with consideration of significant external market drivers, for use as the basis for future metrics to evaluate the success and progress of agency cost control efforts;



- Confirm method for provision of estimate ranges as appropriate for major projects in all phases of delivery (planning, design, and construction);
- Propose processes that support cost control efforts and which effectively build upon previous department specific approaches, including confirmation and updates of comprehensive checklists within the current stage gate and corresponding readiness review procedures;
- Conduct project-focused reviews to more quickly align longer-term EIT planned actions with immediate project needs; and
- Identification of required resource needs to implement the scope of any recommended processes and procedures related to the effort.

**Project Influence Curve and Corresponding Phases of the Project Lifecycle:**

With recognition that as projects progress through the overall project lifecycle - spanning through planning, engineering, construction and operations phases - both the cost drivers and corresponding actions will change; therefore, the needs and opportunities available to influence the project outcome will also vary at each of these key phases. These project stages and the corresponding ability to influence project cost forecasts are depicted visually by the Project Influence Curve in Figure 1.

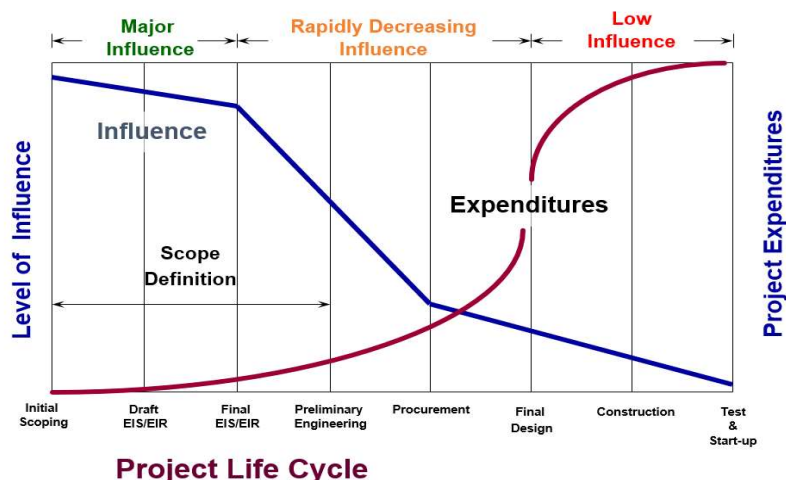


Figure 1 - Project Influence Curve

Although the Project Influence Curve serves as a reminder of the importance of advancing cost control opportunities at the earliest stages of project development, it is also important to recognize that Metro has major projects within all phases of the project lifecycle curve. Currently, Metro has approximately \$25 billion of projects in engineering and construction stages and approximately \$40-\$50 billion of projects in planning stages. Thus, with recognition that Metro has major projects within each project phase, the team is assessing cost drivers within each project delivery phase within the advancement of the EIT initiative.

**Early Intervention Team - Initial Efforts:**

Subcommittees were formed for each major project phase - planning, engineering, construction, operations - to identify key cost drivers and potential cost mitigation opportunities, including

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recognizing actions already underway. Subcommittee leads reported to the EIT on this initial assessment of findings to facilitate information gathering and team collaboration for incorporation into the next steps. An overview of this initial feedback is provided within Attachment A.

In parallel with these EIT subcommittees' efforts, the Program Management department is working to expand updates of project forecasts beyond those reported in the FY23 APE. This includes projects currently in planning and engineering phases, which have not yet established Life of Project (LOP) budgets. At this time, with the awareness they are still subject to final determinations of an environmentally preferred alternative, the PM department has updated potential project cost estimates for the four pillar projects to understand the impacts of current market conditions. In coming months, this reforecasting effort will continue to expand to other Measure M capital projects as well. These updated forecasts will serve as the basis to assess the effectiveness of future cost control processes, particularly for projects in earlier phases of the overall project life cycle when the EIT effort has the best opportunity to influence project outcomes.

In addition to the activities described above, which outline program-wide components of the initial EIT effort, the EIT team is also advancing selective project-focused reviews. By leveraging work done during the project phase assessment, targeted questions have been compiled to guide focused discussions with project teams. This forms the basis to engage the EIT in open discussions related to specific project challenges and opportunities, as well as to assess readiness for advancement to the next phase of the project lifecycle.

To date, the team has conducted an initial review with the East San Fernando Valley (ESFV) team. Additional project-focused reviews are also anticipated for West Santa Ana Branch and Eastside Phase 2 projects in the coming months. These project-focused reviews engage the EIT to support immediate project needs, while also providing an opportunity for the team to refine procedures for effective engagement between the EIT and project teams in support of specific project needs.

## **EQUITY PLATFORM**

While no direct equity impacts are anticipated because of this update, the listed cost drivers and mitigation strategies can disproportionately impact marginalized groups. Examples of this include balancing community benefits and stakeholder engagement with project cost management and ensuring Metro remains a responsive and responsible steward of taxpayer dollars, which are disproportionately generated from lower income communities. These examples will help focus Metro's infrastructure program on riders and residents who rely the most on Metro's system.

## **IMPLEMENTATION OF STRATEGIC PLAN GOALS**

The recommendation supports the following strategic goals:

Strategic Plan Goal #1 - Provide high-quality mobility options that enable people to spend less time traveling. This will be accomplished by planning and delivering multiple capital projects on time and on budget.

Strategic Plan Goal #5 - Provide responsive, accountable, and trustworthy governance within the

Metro organization.

### **NEXT STEPS**

The EIT will hold project-focused reviews on select projects in the coming months. Updates on those projects will include information from these internal EIT reviews.

Additionally, in February 2023, there will be a report back to the Board on the program-wide, organization-wide Early Intervention Team process, including the status on further advancement of all identified EIT objectives and planned actions.

### **ATTACHMENTS**

Attachment A - Early Intervention Team - Initial Project Phase Assessment Exercise

Prepared by: Julie Owen, Sr. Executive Officer, Program Control (213) 922-7313

Reviewed by:

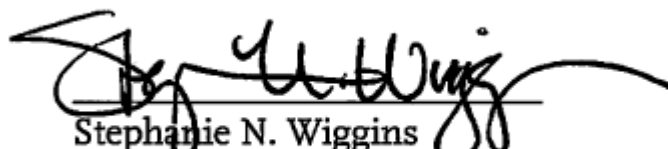
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Conan Cheung, Chief Operations Officer, Mobility Services & Development (213) 418-3034

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Sharon Gookin, Deputy Chief Executive Officer (213) 418-3101



Stephanie N. Wiggins  
Chief Executive Officer

**Early Intervention Team – Initial Project Phase Assessment Exercise:**

**Planning Phase Assessment:**

*Phase purpose: Identify and evaluate project alternatives and environmentally clear a preferred alternative that provides high quality mobility options for diverse communities.*

<b>Identified Cost Drivers</b>	<b>Identified Mitigation Opportunities <sup>(1)</sup></b>
Limited design development and operations team involvement during period of initial scope development.	Implement methodology to conduct stage gate lifecycle project review process to review scope, cost, schedule, and risk. Evaluate cost estimates in ranges to reflect uncertainty in early design and planning phases.
Potential integration of additional community requests, as well as external stakeholder mandates.	Establish a clear project definition (purpose, scope, and goals) to reduce the possibility of subsequently added scope, time, and cost after the selection of Locally Preferred Alternative (LPA).
Third party requirements and payment for expedited review and permitting services to maintain focus on project schedule needs.	Reach agreement with key third parties reflecting scope freeze of critical project components at the end of environmental phase.
Future requirements for construction mitigations and systems planning needs.	Leveraging monthly coordination meetings, identify project constructability needs and conduct assessment of projects' connectivity to systems.

*1 – Identified mitigation opportunities shown may apply to more than one cost driver.*

**Engineering Phase Assessment:**

*Phase purpose: Design the project to provide for the intended scope of work including safety, operational, and maintenance requirements. The contractor uses the design documents as a basis for the project's subsequent construction, testing, and commissioning.*

<b><i>Identified Cost Drivers</i></b>	<b><i>Identified Mitigation Opportunities <sup>(1)</sup></i></b>
Continued project scope growth.	Continue implementation of stage gate lifecycle project review process to review and control scope, cost, schedule, and risk. Involve all Metro departments in developing the project scope during planning and avoid oversimplifying the scope to match the budget.
Third party and utilities requirements, processes and design criteria that differ from those of Metro or are imposed on Metro after completion of planning phase.	Identify items that require permits from third parties. Advance the project in line with the scope freeze of critical project components agreed upon at the end of environmental phase. Enforce policies related to when and how stakeholders can request project enhancements (i.e., betterments), including a process to evaluate and identify related cost, schedule, and third party funding needs.
Discovery of previously unforeseen and/or undefined site conditions.	Provide sufficient soils and geotechnical investigations that align with the project needs to reduce the subsequent risks associated with differing site conditions.
Consideration of FLS requirements, particularly for underground systems.	Evaluate technical solutions to address FLS requirements cost-effectively, leveraging expertise from multiple departments and agencies.
Construction planning with limited contractor involvement.	Advancement of alternative project delivery models, when appropriate, to enhance opportunities to leverage a partnership approach leading into the construction phase of project delivery.

*1 – Identified mitigation opportunities shown may apply to more than one cost driver.*

**Construction Phase Assessment:**

*Phase purpose: Deliver capital projects safely on-time, on-budget while effectively addressing both internal and external stakeholder needs.*

<b><i>Identified Cost Drivers</i></b>	<b><i>Identified Mitigation Opportunities <sup>(1)</sup></i></b>
Ensure project scope is managed and controlled to reduce costly contractor claims and project changes.	Continue implementation of stage gate lifecycle project review process to review scope, cost, schedule, and risk. Leverage advanced technology, such as Building Information Modelling (BIM), during design and construction for improved design efficiency and scope monitoring.
Mega project construction contracts have significant longevity ranging up to ten years. Escalating market conditions have further increased contractor risk, leading to increasingly strained contractor relationships.	Ensure Metro-seasoned key staff who can bring lessons learned from recent projects are embedded into upcoming project teams. For agreed upon changes, ensure change processes are done timely.
Execution of third party/utility agreements later in life cycle and agreements that do not drive desired performance and accountability, resulting in some changing standards, lack of adherence to timelines, late design change requests and imposition of unexpected work hour restrictions by third parties.	Engage third parties/utilities early to finalize agreements, confirm standards, agree upon streamlined processes, and implement design freeze for significant scope components.
Discovery of previously unforeseen and/or undefined site conditions.	Assist with logistical efficiency with respect to environmental and geotechnical issues that arise. For agreed upon changes, ensure change processes are done timely.
Schedule delays and contractor claims resulting in additional project soft costs and professional service cost increases.	Ensure Metro-seasoned key staff who can bring lessons learned from recent projects are embedded into upcoming project teams.  Advancement of alternative project delivery models, when appropriate, to enhance partnership approach and reduce potential impacts of strained relationships.

*1 – Identified mitigation opportunities shown may apply to more than one cost driver.*

**Operations Phase (Testing, Commissioning & Operations) Assessment:**

*Phase purpose: Identify and evaluate project alternatives and environmentally clear a preferred alternative that provides high quality mobility options for diverse communities.*

<b>Identified Cost Drivers</b>	<b>Identified Mitigation Opportunities <sup>(2)</sup></b>
Cost impact for scope necessary for system operations or system implementation needs increase significantly when identified later in the project lifecycle.	Ensure operations team involvement within all phases of the stage gate lifecycle project review process to review scope, cost, schedule, and risk.
Additional and unplanned Bus Bridges requested on projects during implementation phase.	Identify and provide sufficient and as needed resources, via internal staff and bench contractors, to support operations and maintenance review during earlier project phases. This includes, but is not limited to, review of value engineering proposals, bus bridge planning, and subsequent needs related to system expansion.  Ensure project scope components which are critical to future operations and maintenance costs are embedded in the design and closely monitored in earlier stages of project development.
Late engagement of operations expertise, resulting in Value Engineering reversals/corrections to avoid future impacts on maintenance and system operations.	
Unanticipated requirements for partial demolition and reconstruction of existing systems or facilities, which are required to accommodate system expansion.	

*2 – Identified mitigation opportunities shown apply to all cost drivers listed.*

# Annual Program Evaluation Follow-Up – Early Intervention Team Program Advancement

Sharon Gookin, Deputy Chief Executive Officer





# Annual Program Evaluation Follow-Up

(Staff to report back  
in 90 days upon  
creation of Early  
Intervention Team)

## June 2022 Board Items:

- **SANDOVAL AMENDMENT:** *Direct the CEO to develop an Early Intervention Project Team comprised of Metro's finest and the best staff from planning, program management, operations, government relations, OMB, and vendor/contract management to create a list of a comprehensive checklist criteria on successful project delivery addressing such as (1) funding strategy (either it is local or federal project), (2) project delivery method and why the project is being recommended for such delivery method for all Measure M Expenditure Plan Projects.*
- **DUPONT-WALKER AMENDMENT:** *As part of the next report on the cost management action plan, direct the CEO to include metrics to help evaluate the success and progress of cost control efforts; and In the monthly Countywide Planning Major Project Status Report, direct the CEO to include a cost estimate range and design level for all projects.*

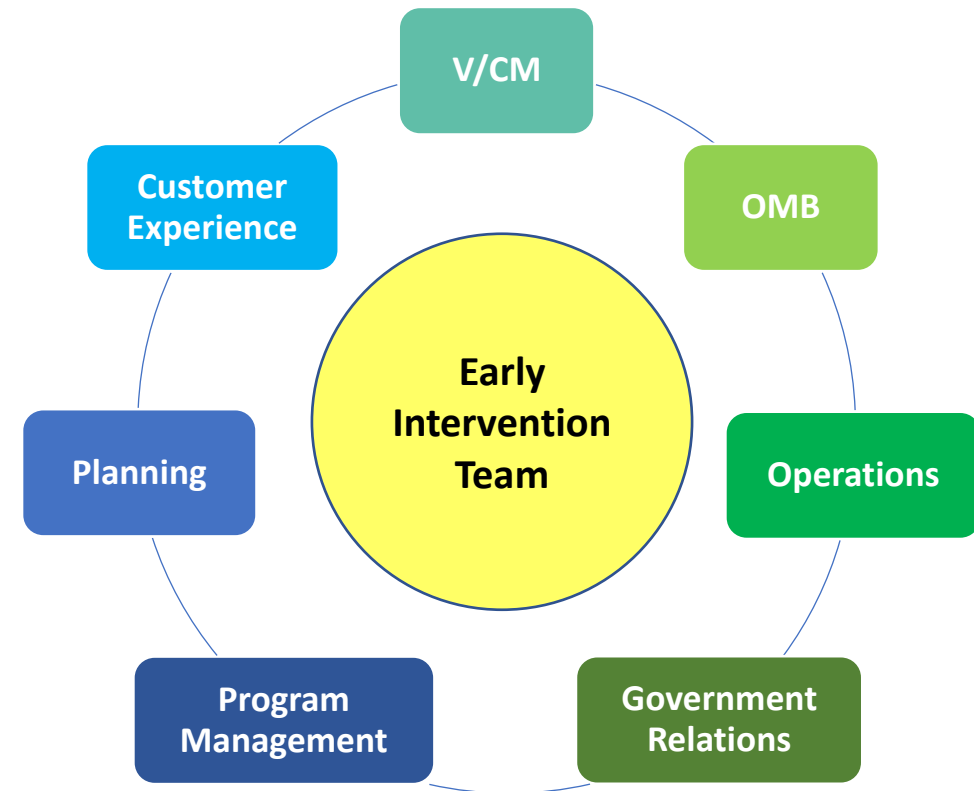
## April 2022 Related Board Item:

- **DUPONT-WALKER REQUEST:** *Establish specific measures to ensure project scope growth is being managed and controlled during all phases of project delivery, not just Program Management.*

# Formation & Establishment of Early Intervention Team

- DCEO was assigned to lead the Early Intervention Team (EIT) effort
- Overview of EIT benefits:
  - Enhances teamwork across agency
  - Encourages cross-department collaboration to address full lifecycle needs
  - Facilitates integration of existing department initiatives in an agency-wide manner
  - Establishes vehicle for direct engagement on project-focused reviews
- Kicked off EIT effort in July 2022

Participants were selected by Chiefs and SLT members and include representatives from the following departments:



# Early Intervention Team - Objectives and Actions

## Team Objectives

- Improve successful delivery of the capital program
- Consider and complement related existing agency efforts
- Facilitate an update of project forecasts, with consideration of full lifecycle costs, to support assessing and addressing the agency's ability to deliver the planned capital projects

## Actions, both underway and planned

- Assessment of the primary cost drivers, including decisions related to funding strategy and delivery model
- Updates of project cost estimates for major projects in all phases of delivery
- Conduct project-focused reviews to quickly align EIT actions with immediate project needs
- Propose processes and procedures that support cost control efforts, and which build upon previous department specific approaches
- Identify required resource needs to implement proposed processes and procedures
- Support establishment of metrics to enable visibility of the effectiveness of initiatives

# Project Influence Curve relationship to EIT Initial Effort

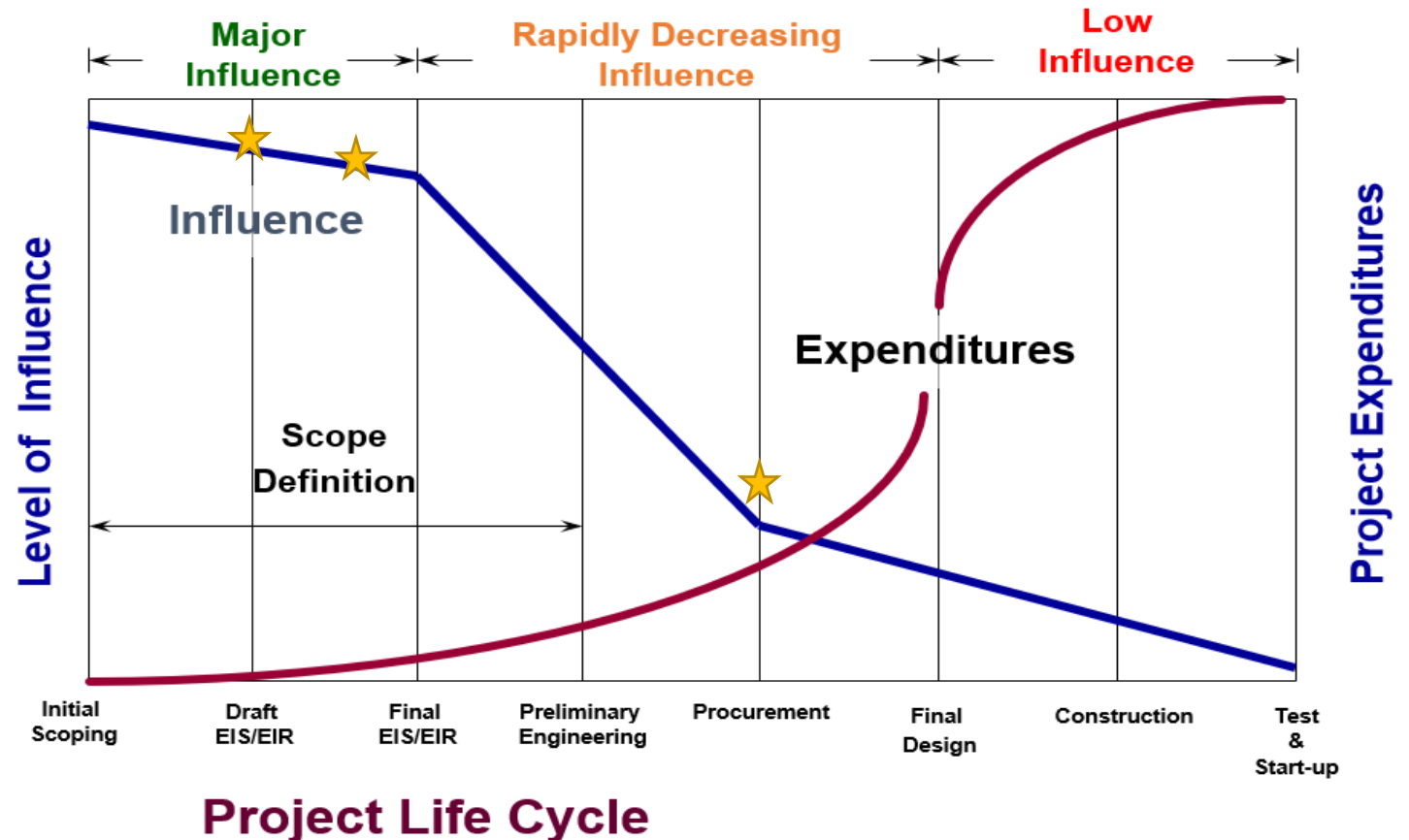
## Major Phases within the Project Lifecycle:

- Planning
- Engineering
- Construction
- Operations

*EIT subcommittees were formed for each major phase to identify key cost drivers and cost mitigation opportunities aligned with that phase of project delivery.*

*EIT is also advancing project-focused reviews for the following projects:*

- *East San Fernando Valley (ESFV)*
- *Eastside Phase 2*
- *West Santa Ana Branch (WSAB)*



★ Reflects current stage of projects selected for EIT reviews

# Current Status and Next Steps

## Work to Date

- ✓ Subgroups performed an initial assessment of cost drivers and corresponding mitigation actions for key project lifecycle phases (Planning, Engineering, Construction, Operations)
- ✓ Leveraging EIT meetings to facilitate cross-department discussion and collaboration related to these initial assessments
- ✓ Program Controls has updated Pillar project cost estimates to current market conditions
- ✓ The EIT held an initial project-focused review with East San Fernando Valley (ESFV) team members

## Next Steps

- Continue to compile subgroup efforts in line with objectives to advance agency processes and procedures that support cost control efforts
- Follow-up related to the ESFV project review
- Perform additional project-focused reviews for other select projects in different lifecycle phases (West Santa Ana Branch, Eastside Phase 2)
- Continue full update of Measure M capital project cost estimates
- Report back to Board in February 2023 on overall EIT effort

Questions?





## Board Report

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**File #:** 2022-0668, **File Type:** Informational Report

**Agenda Number:** 27.

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**CONSTRUCTION COMMITTEE  
October 20, 2022**

**SUBJECT: PROGRAM MANAGEMENT QUARTERLY CHANGE REPORT**

**ACTION: RECEIVE AND FILE**

**RECOMMENDATION**

RECEIVE AND FILE Status Report on Program Management Quarterly Change Report.

**ISSUE**

This board report is a receive and file that provides program management quarterly changes from capital projects greater than \$500,000. Greater detail is provided in Attachment A - Quarterly Change Orders Log for Reporting Period of June 1, 2022 - August 31, 2022.

**BACKGROUND**

In January 2017, the Metro Board approved a one-year pilot to delegate the CEO the authority to execute project agreements up to the Life-of-Project (LOP) budget for the Crenshaw/LAX, Regional Connector, and Purple Line Extension Section 1 & 2 projects. The purpose of the pilot was to save time and minimize disruption due to the typical contract change administration approval process.

The pilot program was effective, generated cost savings, and avoided costly construction delays. At the January 26, 2018, Board meeting, the Board approved the continuation and expansion of the delegation of authority within Life of Project (LOP) budget management on all Transit and Regional Rail Capital Projects. Staff was directed to provide quarterly reports to the Board on change orders and modifications above \$500,000. CEO Board delegated authority of changes is very beneficial to expedite contract changes and avoid costly construction delays. Since the program's inception, up to 2,075 concurrent workdays or concurrent 8.0 years, aggregated across the program, have been saved. (Attachment B)

**DISCUSSION**

The change activities for the reporting period between June 1, 2022, and August 31, 2022, are included in Attachment A.

**FINANCIAL IMPACT**

The changes in this report are included in the approved life-of-project budget for each project.

**EQUITY PLATFORM**

Crenshaw/LAX	Equity - 8 of 8 stations (100%) are within or adjacent to Equity Focus.
Regional Connector	Equity - 3 of 3 stations (100%) are within or adjacent to Equity Focus.
Westside Purple Line Ext 1	Equity - This project is not located within or adjacent to Equity Focus Communities
Westside Purple Line Ext 2	Equity - This project is not located within or adjacent to Equity Focus Communities
Westside Purple Line Ext 3	Equity - 1 of 2 stations (50%) are within or adjacent to Equity Focus Communities.
Division 20	Equity - 100% of the project is within or adjacent to Equity Focus Communities
Airport Metro Connector	Equity - 100% of the project is within or adjacent to Equity Focus Communities
Rail to Rail	Equity - 100% of the project is within or adjacent to Equity Focus Communities
Systemwide Signage	Equity - 55% of the project is within or adjacent to Equity Focus Communities
I-5 North County Enhancements	Equity - This project is not located within or adjacent to Equity Focus Communities

**IMPLEMENTATION OF STRATEGIC PLAN GOALS**

The recommendation supports strategic plan goal # 5 to provide responsive, accountable, and trustworthy governance within the Metro organization by keeping the Board informed of the Projects’ change orders and modifications via submitting the Change Order log on a quarterly basis.

**NEXT STEPS**

The next Change Order Log will cover the period of September 1, 2022, through November 30, 2022, and will be presented to the January 2023 Construction Committee.

**ATTACHMENTS**

Attachment A - Quarterly Change Orders Log for Reporting Period of June 1, 2022 - August 31, 2022.

Attachment B - OIG Construction Change Order Spot Checks CEO Delegated Authority Delays Avoided

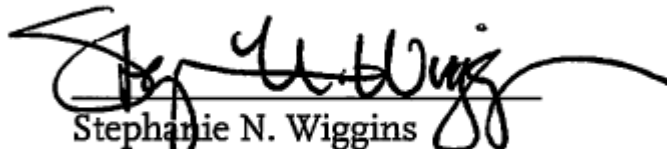


Prepared by:

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- **Regional Connector** - Mathew Antonelli, Project Manager, (213) 893-7114
- **Westside Purple Line Ext 1** - James Cohen, EO Projects Eng., (323) 900-2114
- **Westside Purple Line Ext 2** - Michael McKenna, EO Projects Eng., (424) 551-4447
- **Westside Purple Line Ext 3** - Kimberly Ong, EO Projects Eng., (424) 551-4501
- **Division 20 Portal** - Sameh Ghaly, Deputy Chief Program Management Officer, (213) 418-3369
- **Airport Metro Connector** - Tim Lindholm, Deputy Chief Program Management Officer, (213) 922-7297
- **Metro Blue Line Resignaling** - Tim Lindholm, Deputy Chief Program Management Officer, (213) 922-7297
- **Rail to Rail** - Tim Lindholm, Deputy Chief Program Management Officer, (213) 922-7297
- **Systemwide Signage** - Tim Lindholm, Deputy Chief Program Management Officer, (213) 922-7297
- **I-5 North Country Enhancements** - Tim Lindholm, Deputy Chief Program Management Officer, (213) 922-7297
- **Report** - Julie Owen, Sr. EO Program Control, (213) 922-7313

Reviewed by:

Bryan Pennington, Chief Program Management Officer, (213) 922-7449



Stephanie N. Wiggins  
Chief Executive Officer

Attachment A - Change Order Log for Construction Committee, October 2022 Board

CRENSHAW/LAX TRANSIT PROJECT

I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 – August 31, 2022)						
Change Types: 1 - Betterment 2 - Third Party 3 - Differing Site Conditions 4 - Regulatory Requirements 5 - Scope 6 - Value Engineering 7 - Safety						
A. DESIGN BUILD CONTRACT - CONTRACT NO. C0988 - WALSH SHEA CORRIDOR CONSTRUCTORS						
MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
MOD-00566 CN484 (Resolving older CO216.1 from June 21, 2018)	<b>BOCA Lights (CN-00484):</b> WSCC shall replace light fixtures at both at grade and underground station canopies, excluding Aviation Station. This MOD is a result of the resolution of change order CO-0216.2 from March 2020. <b>The project paid \$465k in March 2020 and will fund the balance of \$543,461.56 for the additional scope described in the modification.</b>	5	7/11/2022	8/3/2022	\$1,101,375	\$999,462
B. PROFESSIONAL SERVICES CONTRACTS						
	None					
C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS						
	None					

**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 – August 31, 2022)**

**A) DESIGN BUILD CONTRACT - CONTRACT NO. C0988 - WALSH SHEA CORRIDOR CONSTRUCTORS**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
None			

**B) PROFESSIONAL SERVICES CONTRACTS**

MOD-00013	<b>E0128-TO-001 (CM-15860) Crenshaw Design Services During Construction - FY23:</b> This authorizes funding for the Systems Engineer Consultant to provide Design Services During Construction (DSDC) support for the Crenshaw Project through Fiscal Year 2023. Various rail systems disciplines, as specified in the Scope of Work, may be utilized to review submittals, project schedules, system oversight, and punchlist items.	5	Between \$500K and less than \$1M
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**C) CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

None			
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**REGIONAL CONNECTOR**

**I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 – August 31, 2022)**

Change Types:

1 - Betterment 2 - Third Party 3 - Differing Site Conditions 4 - Regulatory Requirements 5 - Scope 6 - Value Engineering 7 - Safety

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C0980 - REGIONAL CONNECTOR CONSTRUCTORS**

MOD/CHANGE #	DESCRIPTION <small>(if the change is a unilateral, explain in BOLD fonts)</small>	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
C0980-MOD-237	<b>Increased Provisional Sum for Spare Parts and Test Equipment:</b> Increased additional funding to spare parts and test equipment provisional sum.	5	NA	8/15/2022	NA	\$500,000
C0980-MOD-239	<b>Add 'I AT&amp;T Ductbank Installations at 2nd Street - Construction:</b> Extend the working limits and construction of additional AT&T ductbanks beyond the limits of the 2nd and Broadway station excavation and into Broadway and Spring Streets due to conflicting underground utilities and the poor condition of the existing AT&T termination vaults.	3	8/4/2022	8/17/2022	\$5,349,197	\$4,150,000
C0980-CO-0047.1	<b>New Radio kVA UPS and Backup Power: Construct battery backup power systems at the 7th Metro station to support the full radio system operation. Funded from Project 861228.</b>	5	NA	8/30/2022	NA	\$500,000

**B. PROFESSIONAL SERVICES CONTRACTS**

E0119-MOD-0035	<b>CPJV - FY23 Funding for Design Support During Construction:</b> Continuation of engineering services support during construction.	5	6/9/2022	7/1/2022	\$2,347,868	\$2,347,868
MC070-MOD-00026	<b>Arcadis - FY23 Funding for Construction Management Support Services:</b> Provide funding for staff augmentation to assist Metro with the management of the final design, construction, and closeout of the Project.	5	6/28/2022	7/6/2022	\$4,900,660	\$4,900,660
E0128-TO-022-MOD-006	<b>Scotians - FY23 Systems Engineering Support:</b> Continuation to provide systems design services during construction activities in support of the Project; staff professionals with experience in Rail Systems, Rail Systems Infrastructure, Systems Integration, and Operations.	5	6/22/2022	7/1/2022	\$540,289	\$540,289

**C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

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**D. OTHER AGREEMENTS**

F104-860228-AW-2300	<b>FY23 City of Los Angeles (COLA) Annual Work Plan:</b> COLA provide support services to the Project.	2	NA	6/28/2022	\$3,456,694	\$3,456,694
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**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 – August 31, 2022)**

**A) DESIGN BUILD CONTRACT - CONTRACT NO. C0980 - REGIONAL CONNECTOR CONSTRUCTORS**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
C0980-CN-00317	Add 'I Roadway Pavement Restorations - Construction: Construct additional asphalt grind & overlay and concrete pavements along the project corridor.	5	Between \$500K and less than \$1M

**A. DESIGN BUILD CONTRACT - CONTRACT NO.**

None			
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**B) PROFESSIONAL SERVICES CONTRACTS**

None			
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**C) CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

None			
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**WESTSIDE PURPLE LINE SECTION 1**

**I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 – August 31, 2022)**

Change Types:

1 - Betterment 2 - Third Party 3 - Differing Site Conditions 4 - Regulatory Requirements 5 - Scope 6 - Value Engineering 7 - Safety

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1045 - SKANSKA-TRAYLOR-SHEA, A JOINT VENTURE**

MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
MOD-159	<b>Track Level Access Openings and Mitigations at Wilshire/Western, Wilshire/La Brea, and Wilshire/La Cienega Stations (CN-00220):</b> Due to impacts associated with the Wilshire/San Vicente anomaly, the overall project schedule was delayed. The primary purpose for constructing these track level access openings is to provide the Project with improved construction site logistics. This includes the efficient and safe movement of personnel, materials and equipment within the construction area while the Project is being built. These construction openings are necessary to mitigate schedule risks and reduce the dependency from (the soon to be closed) Division 20 Yard access.	3	6/9/2022	6/30/2022	\$7,147,417	\$5,487,903
MOD-161	<b>ROC Equipment/Cards and provisioning services (Design and Construction) (CN-00146.1):</b> This change allows the contractor to provide all the provisioning services required for the WPLE1 Project to interface with the Metro Rail Operations Center (ROC). At Metro's (Engineering & Operations) request, the WPLE1 Project transferred this scope of work to the contractor.	5	5/13/2022	6/13/2022	\$576,677	\$519,526
MOD-163.1	<b>City of Beverly Hills (COBH) Fiber Optic Restoration (CN-00171.2):</b> The approved Wilshire/La Cienega Traffic Signal Restoration Plans did not incorporate complete restoration of the COBH Fiber Optic System from Wilshire/La Cienega to the Wilshire Tower.	2	8/10/2022	8/30/2022	\$1,334,470	\$1,108,495
CO-10.1	<b>Funding for Claim 2/RFC-13 – Reach 2 Gas Events Dispute:</b> Executive business decision to provide funding for Claim 2/RFC13 Reach 2 Gas Events Dispute until it is resolved. This change order has been issued with a reservation of rights.	3	7/11/2022	6/30/2022	N/A	\$17,600,000
CO-11	<b>Reach 3 TBM Inefficiency from M13 Zone to Safe Haven Stop East of the Wilshire/San Vicente Grout Block (CN-00175):</b> This change compensates the contractor for the recognized inefficiency of the TBM mining operation in this identified stretch of the alignment. The TBM slowdown was intended to keep the TBM's moving and crews working while the grout block at the Wilshire/San Vicente intersection was being installed. This change also minimizes the TBM standby time while it approached the chemical grout block from the east.	3	6/7/2022	6/6/2022	N/A	\$3,529,664
CO-12	<b>Installation of SOE for LADWP Equipment Access Hatch (CN-00222):</b> Preliminary Design Contract drawings and Los Angeles Department of Power (LADWP) prior approval indicated an LADWP equipment hatch buried five feet under the roadway. During the final approval process, LADWP management indicated that a permanent engineered emergency hatch direct to the road surface would be required. This change allows the contractor to design and construct a temporary access hatch during the Wilshire/La Brea Station backfill operation. This will also minimize the impact/effort to install the permanent hatch at a later date.	2	6/6/2022	6/1/2022	N/A	\$500,000

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1078 - CLARK CONSTRUCTION GROUP**

None						
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**B. PROFESSIONAL SERVICES CONTRACTS**

None						
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**C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

WPLE1 – Continuation of Program Control Support Services through FY23	6/2/2022	6/8/2022	6/8/2022	\$600,546.61	\$600,547
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**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 – August 31, 2022)**

**A) DESIGN BUILD CONTRACT - CONTRACT NO. C1045 - SKANSKA-TRAYLOR-SHEA, A JOINT VENTURE**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
CN-00067.1	<u>Tactile Guidance (Construction and Plaza Material Change)</u> : Metro Systemwide Planning requested tactile guidance changes and installation of directional bars to create a tactile pathway for visually impaired passengers to follow for entering and exiting Metro stations. The two tone tiles ensure sufficient contrast to meet ADA requirements.	5	Between \$500K and less than \$1M
CN-00190	<u>COBH - Fiber Optic Restoration (Betterment)</u> : The approved Wilshire/La Cienega Traffic Signal Restoration Plans did not incorporate complete restoration of the COBH Fiber Optic System from Wilshire/La Cienega to the Wilshire Tower. This portion of the fiber optic restoration is a betterment.	1	Between \$500K and less than \$1M

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1078 - CLARK CONSTRUCTION GROUP**

None			
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**B) PROFESSIONAL SERVICES CONTRACTS**

None			
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**C) CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

None			
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**WESTSIDE PURPLE LINE SECTION 2**

**I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 – August 31, 2022)**

Change Types:

1 - Betterment 2 - Third Party 3 - Differing Site Conditions 4 - Regulatory Requirements 5 - Scope 6 - Value Engineering 7 - Safety

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1120**

MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
MOD-00159	Type X Tunnel Lighting Fixture Substitution (RFC – 00148); This Change (design and construction) substituted tunnel lighting fixture "Type X" on Metro Rail Electrical Standard drawing ES-106 with an approved equal that meets the performance criteria provided in ES-106. The Lighting Fixture shown on Metro Rail Electrical Standard drawing ES-106 is no longer being manufactured by Go Green Solutions.	5	7/22/2022	8/9/2022	\$814,738	\$813,139
CO-00034.2	CCCS Storm Drain and Sanitary Sewer Relocation (Construction of MOD 70); This Change Order (CO) Revision increases the Not-to-Exceed (NTE) value by \$10,064,000 from \$7,936,000 previously authorized, to a total of NTE of \$18,000,000. It covers the construction of the sanitary sewer and storm drain relocation resulting from the West Ancillary and OPE reconfiguration described in CN-00047.1. The Change Order revision was necessary to keep the Work moving while negotiations for a bilateral Mod continue.	5	--	7/7/2022	--	\$10,064,000
CO-00046	Late ROW Availability of Parcel ID W-3801 (RFC-0086) (Unilateral); This change compensates the contractor for construction impacts due to delayed availability of Parcel ID W-3801 which was to occur on or before November 7, 2019 in accordance with SP-16, Site Access Dates, Appendix B Right of Way (ROW) Availability Schedule. This Unilateral Change Order No. 00046 cancels and supersedes the Draft Unexecuted Contract Modification 00157, which the Contractor would not sign. This Change Order is issued at the negotiated lump sum price which was agreed upon with the Contractor.	5	--	8/30/2022	--	\$544,463
CO-00049	CCCS Joint Trench Size Discrepancies (DSC-072) (Unilateral); This change reimburses the Contractor for additional costs to expose, hang and support the joint trench where the dimensions exceed the typical dimensions depicted in utility as-built drawings, and where the joint trench exceeds the contractual design flexibility of 25% for utility support systems. It also reimburses the Contractor for inefficiencies to the CCCS excavation work resulting from the additional support installation. This Unilateral Change Order No. 00049 cancels and supersedes the Unexecuted Contract Modification 00153, which the Contractor would not sign. This Change Order was issued at the negotiated lump sum price which was agreed upon with the Contractor.	5	--	8/30/2022	--	\$2,705,270

**B. PROFESSIONAL SERVICES CONTRACTS**

None						
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**C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

None						
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**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 – August 31, 2022)**

**A) DESIGN BUILD CONTRACT - CONTRACT NO. C1120**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
CN-00198	Elevator Hoistway Framing Steel Upsizing (Construction Only) RFC 150.1: This Change will compensate the Contractor for the increase in construction costs for the elevator hoistway framing steel for Wilshire/Rodeo Station and Century City Constellation Station, due to larger steel members being required by the Final Design compared to what could have been expected based on the Contract Documents (refer to Metro Rail Standard Drawings AS-010, -011, and -012).	5	Between \$500K and less than \$1M

**A. DESIGN BUILD CONTRACT - CONTRACT NO.**

None			
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**B) PROFESSIONAL SERVICES CONTRACTS**

None			
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**C) CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

None			
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**WESTSIDE PURPLE LINE SECTION 3**

**I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 – August 31, 2022)**

Change Types:

1 - Betterment 2 - Third Party 3 - Differing Site Conditions 4 - Regulatory Requirements 5 - Scope 6 - Value Engineering 7 - Safety

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1151 - FKTP**

MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
	None					

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1152 - TPOG**

MOD-070	VA Sta - Water Supply Loop System @ Wilshire/Federal (Design) - The existing LADWP water supply at Federal Blvd and Wilshire Blvd currently consists of two separated single water lines that are not connected, and using this for Metro's Westwood/VA station without modification would only provide water supply from one water main line. Metro's criteria MRDC Section 8.2.5.1 and FLS MRDC Criteria 2.6.3.2 requires domestic water supply to stations to be from two public utility mains; this then allows if one of the water mains is out of service, then water from the second main will still provide water to Metro's station. This change adds a "loop" to connect the two water lines, which then provides the required two sources of water for Metro's Westwood/VA station. In addition, the existing pressure in the LADWP system is not sufficient to provide water to Metro's station, so a portion of the water lines that connects with the loop needs to be upsized from 6" to 8" diameter pipes to provide sufficient water pressure to Metro's station.	5	5/19/2022	6/2/2022	\$1,131,680	\$772,697
CO-015.5	<b>UCLA SE Sta Entrance - 10900 Bldg Interface (Design Only) - Unilateral</b> - Post contract award, the owner of 10900 Wilshire Blvd, Tishman Speyer, required revisions to the C1152 base Contract work at the Westwood/UCLA southeast station entrance area and work that ties into their property. <b>LADWP provided the Customer Station Design Ventilation Requirements Part H document after Change Order CO-00001, which requires additional revisions to the LADWP ventilation design that is located at 10900 Wilshire Blvd in the Metro station plaza area. These revisions have been agreed upon by the property owner and LADWP.</b>	2	7/20/2022	7/29/2022	\$933,989	\$789,033
CO-080.2	UCLA Sta - Ground Improvement - During Final Design of PLE3 (Purple Line Extension 3), it was identified that foundation excavation for adjacent Wilshire Gayley building is planned to take place concurrently with the Westwood/UCLA station excavation. The strip of soil that is approximately 9ft wide separating the two excavations need to be strengthened (ground improvement) for improving soil stability during excavations.	5	7/22/2022	8/3/2022	N/A	\$3,500,000

**B. PROFESSIONAL SERVICES CONTRACTS**

AE35279-017-MOD-00008	PMSS - WPLE 3 services through FY23 - Continuation of Program Management Support Services (PMSS) through FY23. PMSS staff support augments existing PLE 3 Project Management to support the project needs for Estimating and Configuration Management.	5	6/8/2022	6/13/2022	\$1,130,109	\$1,130,500
PS43502000-MOD-00079	WSP Engineering Support for Adjacent Construction of Wilshire Gayley Development - The Wilshire Gayley development is adjacent to the Westwood/UCLA Station. This change is required to provide engineering support services for Metro to coordinate design and construction work of the UCLA station with the WG development.	5	7/14/2022	7/18/2022	\$696,110	\$696,110

**C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

	None					
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**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 – August 31, 2022)**

**A) DESIGN BUILD CONTRACT - CONTRACT NO. C1151 - FKTP**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
None			

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1152 - TPOG**

CO-035.2	<p>VA Steam Tunnel Size Increase and Redundancy – VA Sta - CONSTRUCTION ONLY</p> <p><i>The base Contract requires relocation of the existing steam line/tunnel; however, the Veterans Affairs (VA) Department is requiring an enlarged steam tunnel built to current VA design criteria due to the VA hospital reliance on this Mission critical utility. Metro executed a Memorandum of Understanding (MOU) with the Veterans Affairs (VA) Department in March 2019 as part of the process to acquire easement rights to construct and operate the Westwood/VA Hospital Station. The MOU included requirements for an enlarged steam line tunnel to accommodate the relocated steam line and associated existing utilities and provide accommodations for a future expansion of the steam equipment.</i></p>	2	Between \$5M and \$10M
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**B) PROFESSIONAL SERVICES CONTRACTS**

None			
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**C) CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

MC073-MOD-00019.1	<p>Extension of Construction Management Support Services Through Fiscal Year 2023</p> <p><i>Continuation of funding for services (through FY23) within the Contract base scope of work.</i></p>	5	More than \$15M
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**DIVISION 20 PORTAL WIDENING TURNBACK**

**I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 – August 31, 2022)**

Change Types:

1 - Betterment 2 - Third Party 3 - Differing Site Conditions 4 - Regulatory Requirements 5 - Scope 6 - Value Engineering 7 - Safety

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1136 - TUTOR PERINI CORPORATION**

MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
CO 5.02(MOD#30)	<b>Differing Site Conditions at 1st Street Viaduct:</b> This UCO covers MOD#30. The Contractor refused to sign the MOD, wanting Metro to include subcontractor bond costs. Work entails removal of existing street car track in the limits of the Viaduct modification and providing a taper between the newly paved and unpaved lanes on the bridge deck.	3	7/6/2022	7/26/2022		\$1,074,799
CO 23.1(MOD#32)	<b>Additional Third Rail-TailTracks TL1 and TL2:</b> This UCO covers MOD#32. The contractor refused to sign the MOD, wanting Metro to include subcontractor bond costs. Work consists of contact rail, track and train control work on existing tracks TL-1 and TL-2; removal of existing yard sign; install one new bumping post; relocate existing signal.	3	7/6/2022	7/25/2022		\$524,062

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1184 - C3M**

None						
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**B. PROFESSIONAL SERVICES CONTRACTS - CONTRACT NO. AE66758000 - T.Y.LIN INTERNATIONAL**

None						
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**C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS - CONTRACT NO. MC074 ANSER ADVISORY MANAGEMENT LLC**

MOD#008	Continuation of CMSS Services which entails management; coordination; professional services; labor; equipment; materials alongside highly skilled CMSS support staff.				\$15,417,744	\$14,571,872
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**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 – August 31, 2022)**

**A) DESIGN BUILD CONTRACT - CONTRACT NO. C1136 - TUTOR PERINI CORPORATION**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
25.1(CO)	34.5KV Temporary Trainway Feeder: This UCO covers MOD#41. The contractor refused to sign the MOD, wanting Metro to include subcontractor bond costs. Contractor to install temporary trainway feeder from existing manhole AHH10 along the east wall of the tunnel portal to the existing splice at the beginning of the eastern bored tunnel.	6	Between \$500K and less than \$1M
39 (MOD)	Schedule B: Contractor shall perform soil excavation; provide an additional technician (Communication; Train Control; Traction Power; Radio, electrician) & engage in the treatment & disposal of groundwater above base contract levels.	5	Between \$500K and less than \$1M
70.1(CO)	Alternate Train or Delivery Pathway Amendment: Revisions to the main shop parking lot civil work; train signals and track changes in order to accommodate the temporary train delivery route from Sante Fe Avenue.	5	Between \$500K and less than \$1M

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1184 - C3M**

None			
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**B) PROFESSIONAL SERVICES CONTRACTS - CONTRACT NO. AE66758000 - T.Y.LIN INTERNATIONAL**

None			
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**C) CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS - CONTRACT NO. MCO74 ANSER ADVISORY MANAGEMENT LLC**

None			
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**AIRPORT METRO CONNECTOR**

**I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 – August 31, 2022)**

Change Types:

1 - Betterment 2 - Third Party 3 - Differing Site Conditions 4 - Regulatory Requirements 5 - Scope 6 - Value Engineering 7 - Safety

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1194 - HPH**

MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
	None					

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1197 - Tutor**

MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
Tutor - C1197 Mod 9	Bulletin 16 - Light Rail Train (LRT) Fence Updates  Contractor shall implement Architect's "Bulletin 16" to incorporate updates to the Light Rail Transit (LRT) Stainless-Steel (SS) fencing. Scope of Work includes: -Reduced LRT fence post width -Reduced SS picket thickness -Revised horizontal support assembly -Added mulch surface finish -Revised LRT SS fence post embedment depth -Revised LRT fence post footing connection	5	7/18/2022	8/22/2022	2,858,617	2,319,894

**B. PROFESSIONAL SERVICES CONTRACTS**

None						
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**C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

None						
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**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 – August 31, 2022)**

**A) DESIGN BUILD CONTRACT - CONTRACT NO. C1194 - HPH**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
None			

**A) DESIGN BUILD CONTRACT - CONTRACT NO. C1197 - Tutor**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
None			

**B) PROFESSIONAL SERVICES CONTRACTS - DSDC Gruen**

Cubic - CN 274 Mod TBD	<u>AMC Fare Equipment:</u> Scope of Work items including E2 Fare Gates, Spares, Integration, and Installation of all equipment.	5	Between \$1M and \$5M
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**C) CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

None			
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**METRO BLUE LINE RESIGNALING**

**I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 – August 31, 2022)**

Change Types:

1 - Betterment 2 - Third Party 3 - Differing Site Conditions 4 - Regulatory Requirements 5 - Scope 6 - Value Engineering 7 - Safety

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1081 - Metro Blue Line Resignalling - Mass Electric**

MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
	None					

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1086 - Metro Blue Line Ped Gates - Icon West**

Mod 50 (CN 57)	Comprehensive Settlement of Open Change Orders, including C1086-CO-00009 for Additional Work within City of LA					
(Final Negotiated Price for Work Started under CO 9)	C1086 Mod 50 constitutes a mutual full accord and satisfaction to resolve and settle all open Change Notice(s), Change Orders, and Requests for Change, NOICs and Claims (actual or potential, known or unknown), including from any and all Subcontractors, and any and all impacts to Contract Time.					
(1086 Icon West paid using Project 205108 not 205104)	The Contractor is responsible for providing labor, material, and equipment to address the outstanding items required to be completed before obtaining City sign off. These items include, but are not limited to the following: - Removal and replacement of existing pole foundations - Adjustment of street light poles to grade - Relocation of existing pull boxes - Preparation of street lighting plans to the City of Los Angeles Bureau of Street Lighting (LABSL) for review and approval - Coordination of traffic signal equipment removal and reinstallation with the City of Los Angeles Department of Transportation (LADOT)  Work will be paid using Project 210108 not 205104.	5	8/2/2022	8/10/2022	919,566	919,566

**B. PROFESSIONAL SERVICES CONTRACTS**

	None					
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**C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

	None					
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**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 – August 31, 2022)**

<b>A) DESIGN BUILD CONTRACT - CONTRACT NO. C1081 - Metro Blue Line Resignalling - Mass Electric</b>			
CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
None			
<b>A. DESIGN BUILD CONTRACT - CONTRACT NO. Contract C1086 - Metro Blue Line Ped Gates - Icon West</b>			
None			
<b>B) PROFESSIONAL SERVICES CONTRACTS</b>			
None			
<b>C) CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS</b>			
None			

**RAIL TO RAIL**

**I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 – August 31, 2022)**

Change Types:

1 - Betterment 2 - Third Party 3 - Differing Site Conditions 4 - Regulatory Requirements 5 - Scope 6 - Value Engineering 7 - Safety

**A. DESIGN BUILD CONTRACT - CONTRACT NO. C1166 - Rail to Rail (Griffith)**

MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
CO 1 - CN n/a	<p><b>CO 1, the CO 1.1, now CO 1.2: Soil Remediation West of Inskip Avenue</b></p> <p>Soil was found to be "hazardous" not "contaminated" and contractor has to be reimbursed for the higher cost of disposing of such soil. Onsite Track Impacted Soil Remediation between Inskip Ave and 11th Ave</p> <p>Contractor to provide the required labor, material, and equipment necessary to handle and treat the remaining Track Impacted Area non-RCRA/Cal-Haz soils onsite and hot spots areas. The track impacted area is approximately 15,650 cubic yards. The width is approximately 9 feet from track centerline in both directions, and depth is 1.5 ft.</p>	5	04/28/22	5/4/2022	\$6,000,000	Previously reported as \$3,500,000 Now \$6,369,900 ROM

**B. PROFESSIONAL SERVICES CONTRACTS**

Ramos - Task Order 2 Mod 1	<p><b>Construction Management Support Services (CMS) for Rail to Rail</b></p> <p>Task Order 2 is to staff the field office with Resident Engineer (RE), Assistant RE, Office Engineers, and other staff. Metro executed Mod 1 to fund Task Order 2 through the end of the construction contract C1166.</p>	5	7/27/2022	8/3/2022	\$5,007,489	\$4,716,951
HDR AE59600 TO 18	<p><b>Design Support During Construction</b></p> <p>HDR TO 18 under Contract AE59600 is to provide design support during construction for the duration of construction contract C1166.</p>	5	8/3/2022	8/15/2022	\$1,271,665	\$1,271,665

**C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

	None					
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**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 – August 31, 2022)**

**A) DESIGN BUILD CONTRACT - CONTRACT NO. C1166 - Rail to Rail (Griffith)**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
None			

**A. DESIGN BUILD CONTRACT - CONTRACT NO.**

None			
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**B) PROFESSIONAL SERVICES CONTRACTS**

None			
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**C) CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

None			
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**SYSTEMWIDE SIGNAGE**

**I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 – August 31, 2022)**

Change Types:  
 1 - Betterment   2 - Third Party   3 - Differing Site Conditions   4 - Regulatory Requirements   5 - Scope   6 - Value Engineering   7 - Safety

**A. DESIGN BUILD CONTRACT - CONTRACT NO.**

MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
C980 - CO 48 Mod TBD	Regional Connector Punch Out Work -- signage portion:  Change Order 48 cancels and supersedes Unexecute C980 Mod 236.1 (CN 305.1)	5	8/17/2022	8/31/2022	\$6,826,889	\$5,913,433

**B. PROFESSIONAL SERVICES CONTRACTS**

None						
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**C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

None						
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**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 – August 31, 2022)**

**A) DESIGN BUILD CONTRACT - CONTRACT NO.**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
None			

**A. DESIGN BUILD CONTRACT - CONTRACT NO.**

None			
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**B) PROFESSIONAL SERVICES CONTRACTS**

None			
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**C) CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS**

None			
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## I-5 North County Enhancements Project

### I. APPROVED MODIFICATIONS/CHANGES GREATER THAN \$500K IN THIS REPORTING PERIOD (June 1, 2022 - August 31, 2022)

Change Types:

1 - Betterment 2 - Third Party 3 - Differing Site Conditions 4 - Regulatory Requirements 5 - Scope 6 - Value Engineering 7 - Safety

#### A) DESIGN BID BUILD CONTRACT - CONTRACT NO. C70396C1205 - OHL USA, INC.

MOD/CHANGE #	DESCRIPTION (if the change is a unilateral, explain in <b>BOLD</b> fonts)	Change Type	Submission Date	Approval Date	Contractor's Proposed Amount	Approved Amount
	None					

#### B. PROFESSIONAL SERVICES CONTRACTS

CONTRACT NO. AE469080015383 - JACOBS ENGINEERING						
	None					
CONTRACT NO. AE51181EN084 - BURNS & McDONNELL						
	None					
CONTRACT NO. AE30673002 - PARSONS TRANSPORTATION						
	None					
CONTRACT NO. PS58665013TO11 - ARCADIS						
	None					
CONTRACT NO. AE35279008CWO005 - KKCS/TRIUNITY JOINT VENTURE						
	None					
CONTRACT NO. PS73323000 - PRECISION MATERIAL MANAGEMENT, LLC						
	None					
CONTRACT NO. EN66937000-026 - KLEINFELDER, INC.						
	None					
CONTRACT NO. PS20111-078 - ICF JONES & STOKES, INC.						
MOD 1	Regulatory permitting required on Project limits and environmental commitment compliance	4	8/18/2022	8/31/2022	\$849,685	\$849,685

#### C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS - CONTRACT NO. PS67828000 - HILL INTERNATIONAL

	None					
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**II. PENDING MODIFICATIONS/CHANGES GREATER THAN \$500K (June 1, 2022 - August 31, 2022)**

**A) DESIGN BID BUILD CONTRACT - CONTRACT NO. C70396C1205 - OHL USA, INC.**

CHANGE NOTICE/ORDER #	DESCRIPTION	Change Type	Rough Order of Magnitude Cost
None			

**B. PROFESSIONAL SERVICES CONTRACTS**

<b>CONTRACT NO. AE469080015383 - JACOBS ENGINEERING</b>			
None			
<b>CONTRACT NO. AE51181EN084 - BURNS &amp; McDONNELL</b>			
None			
<b>CONTRACT NO. AE30673002 - PARSONS TRANSPORTATION</b>			
None			
<b>CONTRACT NO. PS58665013TO11 - ARCADIS</b>			
None			
<b>CONTRACT NO. AE35279008CWO005 - KKCS/TRIUNITY JOINT VENTURE</b>			
None			
<b>CONTRACT NO. PS73323000 - PRECISION MATERIAL MANAGEMENT, LLC</b>			
None			
<b>CONTRACT NO. EN66937000-026 - KLEINFELDER, INC.</b>			
None			
<b>CONTRACT NO. PS20111-078 - ICF JONES &amp; STOKES, INC.</b>			
None			

**C. CONSTRUCTION MANAGEMENT SUPPORT SERVICES CONTRACTS - CONTRACT NO. PS67828000 - HILL INTERNATIONAL**

None			
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**Attachment B - OIG Spot Check CEO Delegated Authority Delays Avoided**

Project Name	Total Work Days Saved	Years Saved
<b>Crenshaw/LAX</b>	336	1.3
<b>Regional Connector</b>	420	1.6
<b>Purple Line Section 1</b>	629	2.4
<b>Purple Line Section 2</b>	397	1.5
<b>Purple Line Section 3</b>	248	1.0
<b>Division 20</b>	45	0.2
<b>Total Savings</b>	<b>2075</b>	<b>8.0</b>





Board Report

File #: 2022-0686, File Type: Informational Report

Agenda Number: 28.

CONSTRUCTION COMMITTEE  
OCTOBER 20, 2022

**SUBJECT: PROGRAM MANAGEMENT MAJOR PROJECT STATUS**

**ACTION: RECEIVE AND FILE**

**RECOMMENDATION**

RECEIVE AND FILE Program Management Major Project Status Report.

**ISSUE**

Program Management’s major capital status report provides significant highlights regarding several major capital projects that are nearing or under construction.

**BACKGROUND**

Metro’s mission is to provide a world-class transportation system that enhances the quality of life for all who live, work, and play within LA County. Program Management oversees the construction of major capital projects. The attached project status report provides significant information about the progress of 10 major capital projects (Crenshaw LAX, Regional Connector, Westside Purple Line Sections 1, 2, and 3, Airport Metro Connector, G Line BRT Improvements, Gold Line Foothill Ext. Phase 2B, I-5 North County Enhancements, and Division 20 Portal Widening Turnback).

**DISCUSSION**

The project status report highlights the 10 aforementioned major projects concerning cost and schedule performance, small business project participation status, safety, risk, and equity. The report highlights construction activities during September 2022. The safety data is based on the latest available information, consistent with reporting timelines.

**EQUITY PLATFORM**

Crenshaw/LAX	Equity - 100% (8 of 8 stations) within or adjacent to Equity Focus Communities.
Regional Connector	Equity - 100% (3 of 3 stations) within or adjacent to Equity Focus Communities.
Westside Purple Line Ext 1	Equity - this project is not within or adjacent to Equity Focus Communities.

Westside Purple Line Ext 2	Equity - this project is not within or adjacent to Equity Focus Communities.
Westside Purple Line Ext 3	Equity - 50% (1 of 2 stations) within or adjacent to Equity Focus Communities.
Airport Metro Connector	Equity - 100% within or adjacent to Equity Focus Communities.
G Line BRT Improvements	Equity - 65% (11 of 17 stations) within or adjacent to Equity Focus Communities.
I-5 North County Enhancements	Equity - this project is not within or adjacent to Equity Focus Communities.
Gold Line Foothill Ext. Phase 2B	Equity - 100% within or adjacent to Equity Focus Communities.
Division 20 Portal Widening Turnback	Equity - 100% within or adjacent to Equity Focus Communities.

**IMPLEMENTATION OF STRATEGIC PLAN GOALS**

Strategic plan goal # 1, Metro will expand transportation options, improve the quality of its transit network and assets, and take steps to manage demands on the entire network.

**SAFETY**

The safety national average rate is 2.4. Below are project’s recordable injury rate as compared to the national average.

	Project Hours	Recordable Injury Rate	Comments
Crenshaw/LAX	11,426,841	1.78	Below National Average
Regional Connector	7,417,605	0.73	Below National Average
Westside Purple Line Ext 1	7,316,693	1.09	Below National Average
Westside Purple Line Ext 2	2,863,982	3.00	Above National Average
Westside Purple Line Ext 3 (C1151)	1,099,478	2.73	Above National Average
Westside Purple Line Ext 3 (C1152)	1,009,589	0	Below National Average
Airport Metro Connector	129,560	1.54	Below National Average
G Line BRT Improvements Project	0	0	Not in construction

I-5 North County Enhancements	102,930	0	Below National Average
Gold Line Foothill Ext. Phase 2B	1,176,236	0.51	Below National Average
Division 20 Portal Widening Turnback	545,997	0.73	Below National Average

The safety data is based on the latest available information, consistent with reporting timelines.

**NEXT STEPS**

Staff will continue to work toward the completion of major capital projects. The next quarterly Program Management major project status report and updates will be in January 2023.

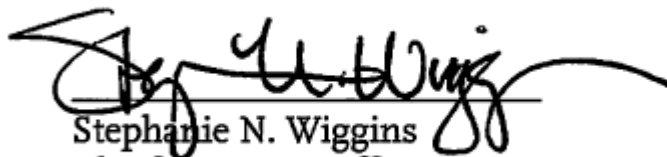
**ATTACHMENT**

Attachment A - Program Management Major Project Status Report - October 2022

Prepared by: Sameh Ghaly, Deputy Chief, Prog Mgmt. Officer., (213) 418-3369  
Timothy Lindholm, Deputy Chief, Prog Mgmt. Officer. (Interim), (213) 922-7297

Tashai Smith, Deputy Executive Officer, Diversity & Economic Opportunities (213) 922-2128 (Small Business Chart information)

Reviewed by: Bryan Pennington, Chief Program Management Officer (213) 922-7449



Stephanie N. Wiggins  
Chief Executive Officer

# **Program Management Major Project Status Report**

Presented By

**Bryan Pennington**

Chief Program Management Officer

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October 2022

Los Angeles County Metropolitan Transportation Authority



# PROJECT BUDGET & SCHEDULE STATUS SUMMARY CHART

Project	Cost Performance		Schedule Performance		Comments
	Variance Approved LOP	Variance Revised Budget	Variance Original	Variance Revised Schedule	
Crenshaw/LAX					Project is 99.9% complete. Substantial Completion Certification was issued on June 17, 2022. SIT-2 testing is over 90% complete and pre-revenue service started in July 2022. Metro continues to work with the contractor to complete CPUC witnessed test, resolve discrepancies from SIT-2 test, finish punch list items, training, O&M and as-builts emphasizing safety and reliability in the final acceptance of project elements, systems and system test reports. Equity - (100%) are within or adjacent to Equity Focus Communities.
Regional Connector					Project is 98% complete. Comprehensive systems integrated testing is underway at all stations and the guideway to include site restoration at street level throughout the alignment. Collaboration by Project and Operations underway to transition into commissioning for revenue service. Equity – (100%) three of three stations are within or adjacent to Equity Focus Communities.
Westside Purple Line Extension-Section 1					Project is 80% complete. The current forecast Revenue Service Date is Fall 2024. Efforts to minimize schedule risk continue. Equity - This Project is not located within or adjacent to Equity Focus Communities.
Westside Purple Line Extension-Section 2					Project is 54% complete and proceeding on schedule and within budget. Equity - This project is not located within or adjacent to Equity Focus Communities.
Westside Purple Line Extension-Section 3					Project is 42% complete and proceeding on schedule and within budget. Equity - (50%) 1 of 2 stations are within or adjacent to Equity Focus Communities.
Gold Line Foothill Extension Phase 2B					Project is approximately 59% complete. Construction continues full closure at Fulton Road for utility relocation and construction of grade crossing, station work at Glendora, San Dimas, La Verne and Pomona. Completed Route 66 LRT bridge and at Little Dalton Wash, San Dimas Wash, Puddingstone Channel, Marshall Creek, and Live Oak Channel Bridge. Equity - 100% of the project is within or adjacent to Equity Focus Communities.
Division 20 Portal Widening Turnback					Project is approximately 44% complete. Construction continues with the demolition of Bent 16 on the 1 <sup>st</sup> . Street Bridge, installation of DWP switch gear enclosures, weld rail strings for the North Yard storage tracks, communication ductbanks, utilities, and civil work. A \$75M increase in Life of Project (LOP) was approved on the February 2022 Regular Board meeting. Equity - 100% of the project is within or adjacent to Equity Focus Communities.
Airport Metro Connector					Early Works Phase is 95.6% complete and is now in the process of closing out. Primary station Contractor (21.4% complete) continues with structural foundation, utility underground work, concrete forming for station platform, steel delivery and preparations for erection, and procurement of long-lead material. Equity – (100%) of the project is within or adjacent to Equity Focus Communities.
G Line BRT Improvements					Progressive Design Build Contract Industry Review completed December 2021. RFP released February 2022. Contract award approved by Board August 2022. Pilot Gate construction and testing complete. Advanced Utility Relocation (AUR) and property acquisitions underway. Equity: (65%) 11 of 17 stations are within or adjacent to Equity Focus Communities.
I-5 North County Enhancements					Project is approximately 15% complete. Retaining wall excavation/construction, new Weldon Canyon bridge construction, work on Butte Canyon and Castaic Creek bridges, Aerially Deposited Lead (ADL) removal, roadway excavation and base placement, and drainage/barrier work continues. Equity - This project is not located within or adjacent to Equity Focus Communities.

On target

Possible problem (5-10% variance)

Significant Impact (over 10% variance)

October 2022

# SMALL BUSINESS PROJECT STATUS SUMMARY CHART

Project	Phase	Goal Type	Contractor Commitment	Current Participation	Status	Variance from Last Reporting +/-	*Adjusted Participation %	% Complete	Comments
Crenshaw/LAX	Design	DBE	20.00%	20.51%	Exceeding	-.04%		100%	Wash/Shea Corridor Constructors, JV is exceeding the DBE commitment on both Design and Construction.
	Construction	DBE	20.00%	28.24%	Exceeding	-.01%		100%	
Regional Connector	Design	DBE	22.63%	24.61%	Exceeding	-.04%		99%	Regional Connector Constructors is exceeding the DBE commitment by 1.98% on Design and 2.89% on Construction.
	Construction	DBE	18.00%	20.89%	Exceeding	+1.13%	22.78%	91%	
Westside Purple Line Extension-Section 1	Design	DBE	20.25%	20.69%	Exceeding	+2.24%		95%	Skanska-Traylor-Shea Joint Venture (STS) is exceeding the DBE commitment by 0.44% on Design and has a 1.57% DBE shortfall on Construction. STS has a shortfall mitigation plan on file. STS reported an uptick in DBE participation this reporting period.
	Construction	DBE	17.00%	15.43%	Shortfall	+2.26%	15.63%	81%	
Westside Purple Line Extension-Section 2	Design	DBE	25.31%	36.75%	Exceeding	+3.30%		81%	Tutor Perini/O&G, A Joint Venture (TPOG) is exceeding the DBE commitment on Design by 11.44% and has a 2.09% shortfall on Construction. TPOG has a shortfall mitigation plan on file. TPOG reported an uptick in DBE participation for Construction this reporting period and anticipates DBE utilization to increase further in the 4 <sup>th</sup> quarter of 2022.
	Construction	DBE	17.00%	14.91%	Shortfall	+2.28%		58%	
Westside Purple Line Extension-Section 3 – Tunnels	Design	DBE	11.19%	18.23%	Exceeding	-0.06%		94%	Frontier-Kemper/Tutor Perini JV (FKTP) is exceeding the DBE commitment on both Design and Construction.
	Construction	DBE	17.10%	19.49%	Exceeding	+1.24%	19.59%	81%	
Westside Purple Line Extension-Section 3 – Stations, Trackwork, Systems and Testing	Design	DBE	19.25%	18.25%	Shortfall	+0.08%		82%	Tutor Perini/O&G, A Joint Venture (TPOG) has a 1.00% shortfall on Design and a 13.97% shortfall on Construction. TPOG contends that the Construction shortfall is the result of several scopes of work being performed on the project until substantial completion (3rd quarter 2026). TPOG reported an uptick in DBE participation on both Design and Construction this reporting period.
	Construction	DBE	21.00%	7.03%	Shortfall	+0.01%		34%	
Gold Line/Foothill 2B	Construction	--	--	--	--	--	--	--	Reporting on this contract is handled by the Metro Gold Line Foothill Extension Construction Authority.
Division 20 Portal Widening Turnback	Construction	SBE	19.34%	9.47%	Shortfall	+7.76%	9.68%	55%	Tutor Perini Corporation (TPC) has a 9.87% SBE shortfall and a 0.61% DVBE shortfall. TPC currently has an approved shortfall mitigation plan on file noting delays in the project as the reason for the shortfall. TPC had an uptick in SBE participation this reporting period.
		DVBE	3.31%	2.70%	Shortfall	NC	2.76%		
Airport Metro Connector (Station)	Construction	SBE	20.79%	14.29%	Shortfall	+1.15%		26%	Tutor Perini Corporation's (TPC) has a 6.50% SBE shortfall and a 3.42% DVBE shortfall. TPC reported an uptick in both SBE/DVBE participation this reporting period.
		DVBE	4.96%	1.54%	Shortfall	+1.12%			
G Line BRT Improvements PDD Phase 1	PDB	SBE	18.35%	TBD	TBD	TBD		TBD	Contract was Awarded on August 25, 2022.
		DVBE	3.73%						
I-5 North County Enhancements	Construction	DBE	13.01%	3.30%	Shortfall	-.23%		16%	OHLA USA, Inc.'s current level of DBE participation is 3.30%, representing a shortfall of 9.71%.

October 2022

\*Excludes from contract value time delay, claims, settlements, incentives that Contractor contends has no DBE opportunity.  
 \*\*NC = No Change

# CRENSHAW/LAX TRANSIT PROJECT

BUDGET TIFIA	Approved LOP*	Previous Period**	Current Forecast**
\$2,148M	\$2,058M	\$2,148M	\$2,148M
Variance from Approved LOP:		\$90M (4%)	\$90M (4%) <span style="color: green;">OK</span>
Variance from Revised Budget:			\$0 <span style="color: green;">OK</span>

SCHEDULE Original	Approved Revised	(REVENUE OPERATION)	
		Previous Period	Current Forecast*
Oct.2019	May 2020	Fall 2022	October 7, 2022
Variance from Original:		+1,068d (48%)	+1,068d (48%) <span style="color: red;">▲</span>
Variance from Revised Schedule:		+861d (35%)	+ 868d (35%) <span style="color: red;">▲</span>

\*At time of the award of contract - Board Approval June 2013  
 \*\*Excludes finance costs and includes \$10M Non-TIFIA activities

\*Current Forecast is Contractor's June 2022 Schedule update  
 \*\*Substantial Completion Certification was issued on June 17, 2022.

- **Safety:** Project Hours: 11,426,841; Recordable Injury Rate: 1.78 vs. The National Average: 2.4
- **Substantial Completion Certification was issued on June 17, 2022.**
- **Overall Project Progress is 99.9% complete**
- System Integration Testing (SIT-2) 97.3% complete as of August 2022 for SCADA safety-critical and 90% for non-SCADA items.
- Project staff continues to work with Metro Operations on SIT-2 testing and pre-revenue full simulation, resolving discrepancies exposed during tests and pre-revenue service.
- Safety certification submitted to California Public Utilities Commission (CPUC) on September 14, 2022.
- Metro continues to work with the contractor to complete discrepancies from SIT-2 tests and pre-revenue service and finish punch list items, final cleaning, training, O&M and as-builts for final acceptance.
- **Equity** - 8 of 8 stations (100%) are within or adjacent to Equity Focus Communities.



Expo/Crenshaw Station



Martin Luther King Jr Station



October 2022

As of September 30, 2022

OK On target    
 ◆ Possible problem (5-10% variance)    
 ▲ Significant Impact (over 10% variance)




# REGIONAL CONNECTOR TRANSIT PROJECT

## BUDGET

<u>FFGA</u>	<u>Approved LOP*</u>	<u>Previous Period**</u>	<u>Current Forecast**</u>
\$1,402M	\$1,420M	\$1,755M	\$1,755M
Variance from Approved LOP:		\$335M (24%)	\$335M (24%) 
Variance from Revised Budget:		\$0	

## (REVENUE OPERATION)

## SCHEDULE

<u>Original</u>	<u>Approved**</u>	<u>Previous Period</u>	<u>Current Forecast*</u>
May 2021	Fall 2022	Fall 2022	Q1 2023** 
Variance from Original:		+480d (19%)	+480d (19%) 
Variance from Revised Schedule:			-56days 

\*Current forecast reflects Contractor systems testing delays.  
 \*\*Substantial Completion for ROW was achieved in June 2022

\*At time of the award of contract – Board Approval April 2014  
 \*\*Excludes finance costs

- **Safety:** Project Hours: 7,417,605; Recordable Injury Rate: 0.73 vs. The National Average: 2.4
- **Overall Project Progress is 98% complete**
- **Little Tokyo/Arts District Station & Surrounding Area:** Construction and testing at station and tunnels continue. Elevators, finishes, Art installations and Plaza Level canopy installations continue to pace work.
- **Historic Broadway Station:** The station is focused on finishes, and systems installations and testing. Construction of plaza canopy and related canopy features continue. Street restorations on Broadway, 2nd and Springs streets are continuing behind final utility relocations.
- **Grand Av Arts/Bunker Hill Station:** Finishes, elevators, pedestrian bridge, and systems installations and testing are all near complete. Street restorations are underway on Hope Street; schedule to continue through 2022 as SHPPO MOA is reinstated.
- **Flower Street and 7th/Metro Center:** Final radio installations in 7th/Metro continues. Street restorations on Flower south of 4th Street are continuing - as are final street and intersection improvements.
- **Systems:** Comprehensive integrated testing of all systems continuing. Operations' full access to the Project's facilities for rail activation and start-up anticipated by early November.
- **Equity:** 3 of 3 stations (100%) are within or adjacent to Equity Focus Communities.



Concrete pour for 1st Street sidewalk (Temple & Commercial)



Historic Broadway Station platform

October 2022



On target



Possible problem  
(5-10% variance)



Significant Impact  
(over 10% variance)





Metro <sup>5</sup>



# WESTSIDE PURPLE LINE EXTENSION – SECTION 1



## BUDGET

FFGA	Approved LOP* **	Previous Period**	Current Forecast**
\$2,822M	\$2,774M	\$3,129M	\$3,129M
Variance from Approved LOP:		\$355M (13%)	\$355M (13%) 
Variance from Revised Budget:		\$0	

\*At time of the award of contract – Board Approval July 2014

\*\*Excludes finance costs

## SCHEDULE

(REVENUE OPERATION)			
Original	Approved Rebaseline	Previous Period	Current Forecast*
Nov.2023	Fall 2024	Fall 2024	Fall 2024
Variance from Original:		+365d (11%)	+365d (11%) 
Variance from Revised Schedule:		0d	

\*Current Forecast is Contractor's August 2022 Schedule update

- **Safety:** Project Hours: 7,316,693; Recordable Injury Rate: 1.09 vs. The National Average: 2.4
- **Overall Project progress is 80% complete.**
- **Wilshire/La Brea Station:** second lift wall construction at the west side and excavation at the entrance structure completed. Roof, invert slab and platform construction started. MEP activities, bus lane, curb and gutter restoration continue.
- **Wilshire/Fairfax Station:** Station arched roof construction is complete. Entrance structure roof construction started. Above the roof utility installation and backfill continue. Architectural and MEP activities continue at platform and concourse levels.
- **Wilshire/La Cienega Station:** Above roof venting, waterproofing and backfill activities started. West side level 2 exterior wall concrete activities, Gale Shaft (Blocks 8 & 9) level 2 wall construction and appendage work in the north side continue.
- **Tunneling**
  - **Reach 1:** Track infill slab placement is complete. Electrical and communications installation work started.
  - **Reach 2:** Invert and walkway construction continue in the south tunnel.
  - **Reach 3 & Tail Track:** Concrete work in cross passages #24 and #26 (tail track) remains. Tunnel Boring Machine (TBM) cutterhead removal in the north tunnel is complete.
- **Equity:** This Project is not located within or adjacent to Equity Focus Communities.



Wilshire/Fairfax Entrance Roof Construction



North Tunnel TBM Cutterhead Removal

October 2022



On target



Possible problem  
(5-10% variance)



Significant Impact  
(over 10% variance)



Metro 6

# WESTSIDE PURPLE LINE EXTENSION – SECTION 2

## BUDGET

	Approved	Previous	Current
<u>FFGA</u>	<u>LOP*</u>	<u>Period**</u>	<u>Forecast**</u>
\$2,499M	\$2,441M	\$2,441M	\$2,441M
Variance from Approved LOP:		\$0M (0%)	\$0M (0%) <span style="color: green;">OK</span>
Variance from Revised Budget:			\$0 <span style="color: green;">OK</span>

\*At time of the award of contract – Board Approval January 2017

\*\*Excludes finance costs

## SCHEDULE

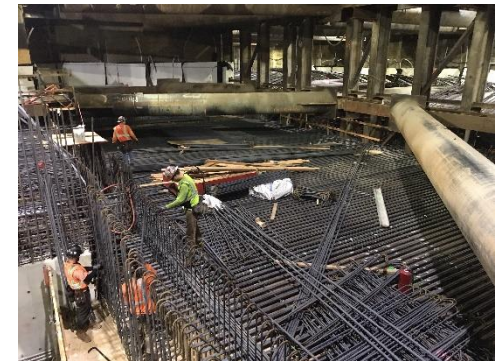
	Approved	(REVENUE OPERATION) Previous	Current
<u>Original</u>	<u>Rebaseline</u>	<u>Period</u>	<u>Forecast*</u>
Aug. 2025	N/A	Summer 2025	Summer 2025
Variance from Original:		+0d (0%)	+0d (0%) <span style="color: yellow;">◆</span>
Variance from Revised Schedule:			0d <span style="color: green;">OK</span>

\*Contract schedule is forecasting a slippage to the contractual milestones. The project team is identifying opportunities to mitigate and is monitoring potential impacts. Staff will provide periodic updates to the Board.

- **Safety:** Project Hours: 2,863,982; Recordable Injury Rate: 3.00 vs. The National Average: 2.4
  - Metro remains concerned about the Contractor's safety record.
- **Overall Project progress is 54% complete**
- **Century City Constellation Station**
  - As of October 5, 2022, Excavation for both the station box and station entrance is 56% complete.
  - Sewer pipe hanging activities have been completed.
- **Wilshire/Rodeo Station**
  - Overall invert slab is 64% complete and will be completed after Tunnel Boring Machines (TBM) mining.
  - Concrete placement for exterior and interior walls at concourse level in the station entrance is complete.
- **Tunneling**
  - Both TBM's are excavating Reach 4, between Wilshire/Rodeo and Wilshire/La Cienega (Stations).
  - Progress of as of October 6, 2022:
    - Ruth (eastbound subway tunnel) – Reach 4: 4,423ft (77%), overall: 10,200ft (89%)
    - Harriet (westbound subway tunnel) – Reach 4: 5,322ft (93%), overall: 11,128ft (96%)
  - Tunneling progress is slower than contractor's baseline.
- **Equity:** This project is not located within or adjacent to Equity Focus Communities.



Constellation Station Excavation Activities



Wilshire/Rodeo Station Rebar Installation for Concourse Level Roof

October 2022



On target



Possible problem  
(5-10% variance)



Significant Impact  
(over 10% variance)



Metro 7

# WESTSIDE PURPLE LINE EXTENSION – SECTION 3

## BUDGET

FFGA	Approved LOP*	Previous Period**	Current Forecast**
\$3,599M	\$3,224M	\$3,224M	\$3,224M
Variance from Approved LOP:		\$0M (0%)	\$0M (0%) <span style="color: green;">OK</span>
Variance from Revised Budget:			\$0 <span style="color: green;">OK</span>

\*At time of the award of contract – Board Approval February 2019

\*\*Excludes finance costs

## SCHEDULE

Original	Approved Rebaseline	(REVENUE OPERATION) Previous Period	Current Forecast*
Mar. 2027	N/A	Spring 2027	Spring 2027
Variance from Original:		+0d (0%)	+0d (0%) <span style="color: green;">OK</span>
Variance from Revised Schedule:			0d <span style="color: green;">OK</span>

\*Current Forecast is Contractor's March Schedule update

\*\*Approval in process

- Safety:** Project Hours: 2,109,067; Recordable Injury Rate: 1.42 vs. The National Average: 2.4
  - C1151: Project Hours: 1,099,478; Recordable Injury Rate: 2.73
  - C1152: Project Hours: 1,009,589; Recordable Injury Rate: 0.0
- Overall Project Progress is 42% complete
- Final design progress is 97% complete
- Westwood/UCLA Station**
  - UCLA station roadway deck panels and beams with associated excavation started on 8/26/22 in Wilshire Blvd and is 5% complete.
- Westwood/VA Station**
  - VA steam tunnel relocation work continues: completed heavy civil work for relocation; structure in place to support the relocated steam tunnel for upcoming station excavation; Mechanical, Electrical, and Plumbing fit-out in progress; and construction of the redundant steam and condensate lines is ongoing. SCE and VA 12" water line relocations completed.
- Tunneling**
  - Both tunnel boring machines (TBMs) "Aura" and "Iris" continue mining east of Westwood/UCLA station. Progress as of September 2, 2022, is as follows:
    - Iris "BR TBM" (westbound subway tunnel) – Reach 6: 5,362 ft (56%), overall: 9,337 ft (69%)
    - Aura "BL TBM" (eastbound subway tunnel) – Reach 6: 4,278 ft. (45%), overall: 8,247 ft. (60%)
  - Tunneling progress is slower than contractor's baseline. Contractor to mitigate schedule delay.
  - Equity:** 1 of 2 stations (50%) are within or adjacent to Equity Focus Communities.



UCLA Station: Installing Structural Steel Beams for Temporary Decking



VA Steam Tunnel: Installing Redundant System (Condensate and Steam Line)

October 2022



On target



Possible problem  
(5-10% variance)



Significant Impact  
(over 10% variance)



Metro 8

# GOLD LINE FOOTHILL EXTENSION PHASE 2B

BUDGET	Approved LOP*	Previous Period	Current Forecast
TOTAL COST	\$1,532.8B		\$1,532.8B
Variance from Approved LOP:		\$0 (%)	\$0(%) <span style="color: green;">OK</span>
Variance from Revised Budget:		\$0	\$0 <span style="color: green;">OK</span>

SCHEDULE	Approved Rebaseline	(Substantial Completion) Previous Period	Current Forecast*
Original January 2025			December 2024
Variance from Original:		+0d (0%)	+353 (-18%) <span style="color: green;">OK</span>
Variance from Revised Schedule:			TBD <span style="color: green;">OK</span>

- **Safety:** Project Hours: 1,176,236 Recordable Injury Rate: 0.51 vs. The National Average: 2.4

- **Overall Project progress is 59% complete.**

Completed construction at Route 66 LRT bridge and LRT bridge structures at Little Dalton Wash, San Dimas Wash, Puddingstone Channel, Marshall Creek, and Live Oak Channel

- **Metro Gold Line Foothill Extension Authority**

The Contractor Kiewit Parsons Joint Venture (KPJV) have completed work at more than half of the grade crossings, completion on the freight track relocation and have started work on all bridges.

The design of the 9 mile, 4 Station extension is substantially complete. First of the four new light rail stations is under construction at Glendora.

CPUC has approved 49 of 49 grade crossings to date

- **Construction Continues at:**

Glendora, San Dimas, La Verne and Pomona Stations

Foothill/Grand Avenue, Foothill/Grand Ave and Lone Hill LRT Bridges

Installed Monte Vista TPSS

Construction of SCRRRA Maintenance-of-way building

210 and 57 Freeway anchor and support walls

construction of MSE retaining walls throughout the project

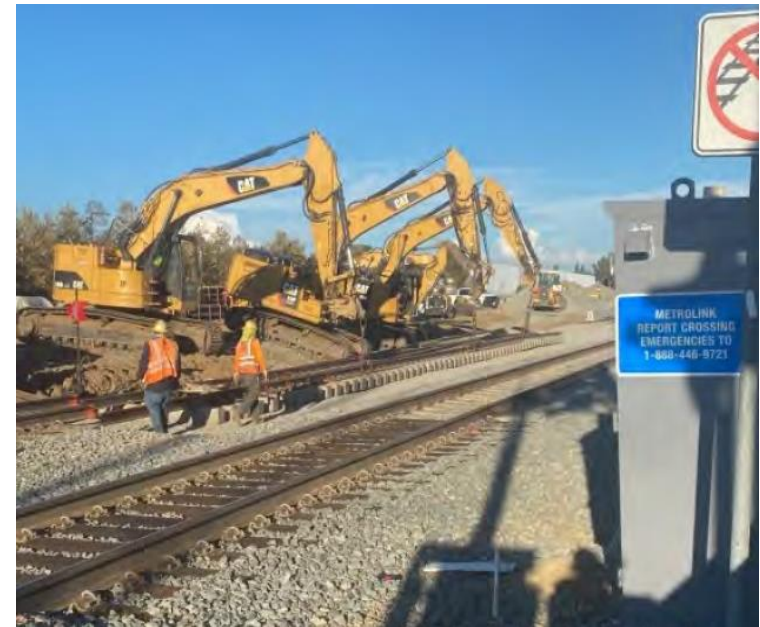
Construction of 210 and 57 Freeway anchor and support walls

Light rail alignment track construction

LRT train control installation

- **Equity:** 100% of the project is located within or adjacent to Equity Focus Communities

Garey East – Metrolink Turnout installed



October 2022

OK On target

◆ Possible problem (5-10% variance)

▲ Significant Impact (over 10% variance)

# DIVISION 20 PORTAL WIDENING TURNBACK

BUDGET	Approved LOP*	Previous Period	Current Forecast
TOTAL COST	\$876.7M	\$876.7M	\$876.7M
Variance from Approved LOP:		\$0 (%)	\$0(%) <span style="color: green;">OK</span>
Variance from Revised Budget:		\$0	\$0 <span style="color: green;">OK</span>

\*At time of the award of contract – Board Approval (February 2020)

SCHEDULE	Approved Rebaseline	(Substantial Completion) Previous Period	Current Forecast*
<u>Original</u> June 2024	Summer 2022	June 2024	Summer 2025
Variance from Original:		+0d (0%)	+406d (26%) <span style="color: red;">⚠</span>
Variance from Revised Schedule:			TBD <span style="color: green;">OK</span>

\*Current Forecast is Contractor's Schedule update

- **Safety:** Project Hours: 545,997; Recordable Injury Rate: .73 vs. The National Average: 2.4
- **Overall Project progress is 44% complete**  
Recent activities: 1<sup>st</sup> St. Bridge Bent 16 Demolition, DWP Switch Gear enclosures installation, North Yard storage tracks weld rail strings
- **C1136 TPC Portal Widening Turnback Contract**  
PWT C1136 Contract progress is 45%  
Phase 1 Track, utilities, and civil work continues  
1st Street Bridge Rehabilitation 100% complete  
Continue Factory Acceptance Testing for Train Control Bungalow
- **Major Change Orders to Date:**  
Hazardous Material Removal  
1<sup>st</sup> St Bridge Repairs of Differing Site Conditions  
Completion of early utility Contracts  
3<sup>rd</sup> Party Interfaces  
Design Revisions (*in progress*)
- **C1184 C3M Traction Power Substation Contract** at 70%
- **Coordination with Adjacent Projects**  
Purple Line Extension (PLE1), Regional Connector;  
Metro Center Project, HR4000 AND A650 Vehicle Delivery
- **Continued Regular risk assessments to determine budget/schedule**
- **Equity:** 100% of the project is located within or adjacent to Equity Focus Communities

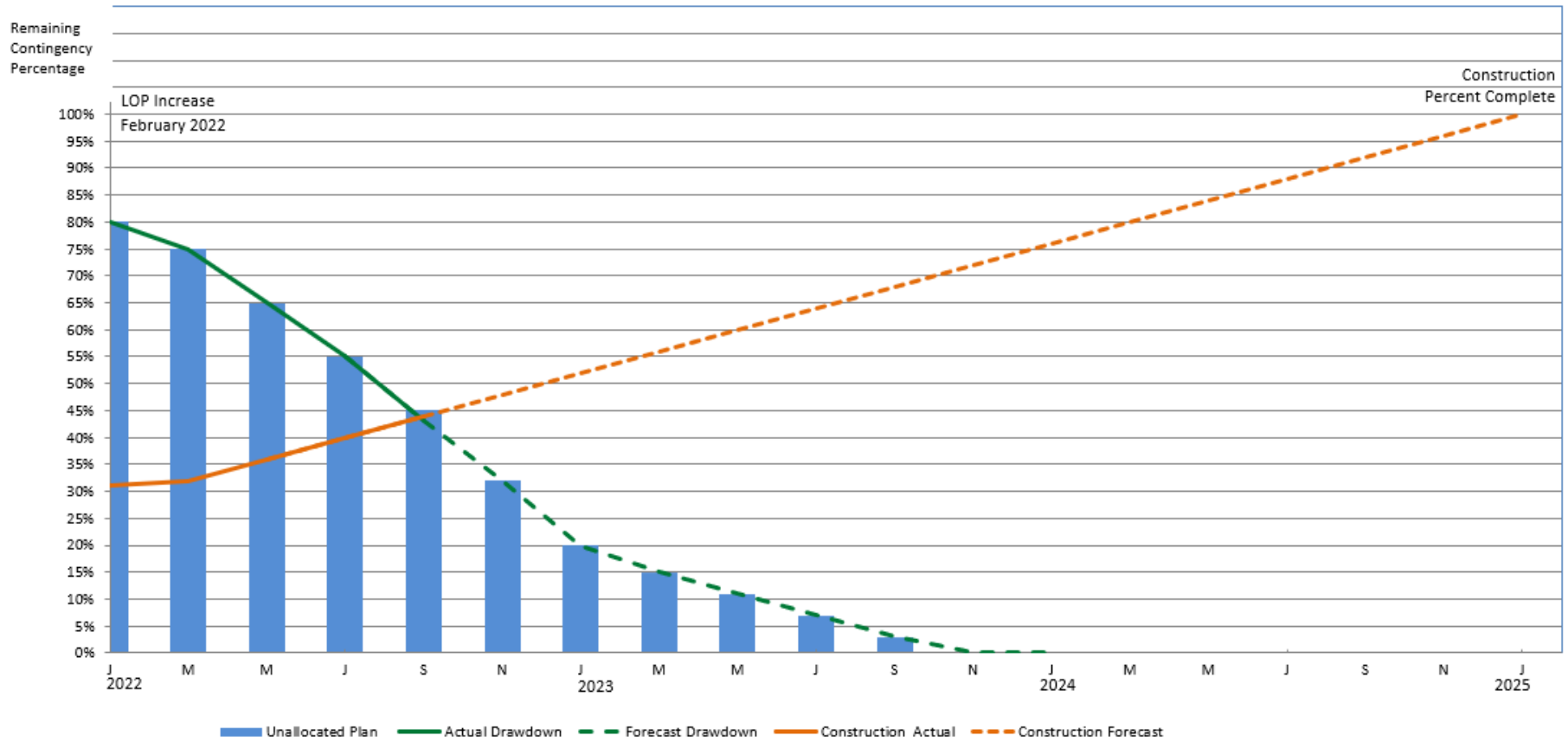


October 2022

OK On target    
 ◆ Possible problem (5-10% variance)    
 ⚠ Significant Impact (over 10% variance)

# DIVISION 20 PORTAL WIDENING TURNBACK

## Unallocated Contingency Drawdown with Construction Percent Complete Comparison



October 2022

Los Angeles County Metropolitan Transportation Authority

# AIRPORT METRO CONNECTOR (AMC) PROJECT

BUDGET	Approved LOP*	Previous Period	Current Forecast
TOTAL COST	\$898.6M	\$898.6M	\$898.6M
Variance from Approved LOP:		\$0M (0%)	\$0M (0%)
Variance from Revised Budget:			\$0

\*Approved April 2021 Board

SCHEDULE	Approved Rebaseline	(Revenue Operation) Previous Period	Current Forecast*
Original	N/A	Fall 2024	Fall 2024
Variance from Original:		+0d (0%)	+0 d (0%)
Variance from Revised Schedule:			0d

\*Current Forecast is Metro's August 2022 Schedule update

**Safety:** Project Hours: 129,560; Recordable Injury Rate: 1.54 vs. The National Average: 2.4

**Progress:**

- Early Works Phase construction is 95.6% complete and is in close-out phase.
- North Turn back and reconfiguration with turnback facility is completed and undergoing pre-revenue testing.
- Primary Station Construction (21.4% ) continues with installation of final structural footings and start of station platform concrete, underground utilities, delivery and preparation for steel erection, and procurement of long-lead material. Work within the Light Rail Transit (LRT) area has been expedited.
- **Equity:** 100% of the project is located within or adjacent to Equity Focus Communities.



October 2022

● On target    
 ◆ Possible problem (5-10% variance)    
 ▲ Significant Impact (over 10% variance)



# G LINE BRT IMPROVEMENTS PROJECT

BUDGET	Approved LOP	Previous Period	Current Forecast
TOTAL COST	N/A	N/A	\$392 M - \$476 M
Variance from Approved LOP:		\$0M (0%)	\$0M (0%) <span style="color: green;">OK</span>
Variance from Revised Budget:			\$0 <span style="color: green;">OK</span>

*\*Project will work within the annual budget constraints until LOP is established*

SCHEDULE	Approved Rebaseline	(Revenue Operation) Previous Period	Current Forecast*
Original	N/A	N/A	Dec 2026
Variance from Original:		+0d (0%)	+0 d (0%) <span style="color: green;">OK</span>
Variance from Revised Schedule:			0d <span style="color: green;">OK</span>

*\*Current Forecast is Metro's Internal Schedule, Baseline schedule not yet approved at time of update*

- **Progressive Design Build Contract:**
  - Progressive Design Build (PDB) Contract approved by Board in August 2022.
- **Utility Owner-performed AURs:**
  - Sepulveda – removal of poles and overhead wires pending PDB contractor installation of new power service.
  - Vesper – DWP crews completed cable pulling in August, Charter tentative construction start in October.
  - Sylmar – work complete within City ROW, DWP license agreement executed, remaining work to commence in October.
- **Property Acquisitions underway:**
  - Eight acquisitions underway, all-in negotiation or agreement phase.
  - Offers presented to owners between March 31, 2022 and May 24, 2022.
  - Board adopted Resolution of Necessity for all properties in August 2022.
- **Equity:** 11 of 17 stations (65%) are within or adjacent to Equity Focus Communities.



DWP Overhead Construction at Vesper



DWP Overhead Construction at Vesper

**October 2022**



On target



Possible problem (5-10% variance)



Significant Impact (over 10% variance)



**Metro**<sup>13</sup>



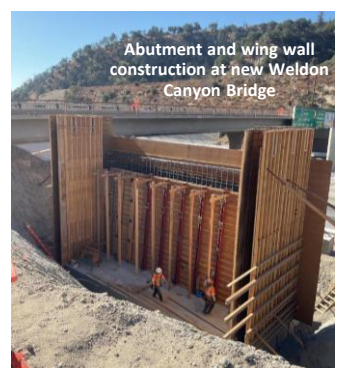
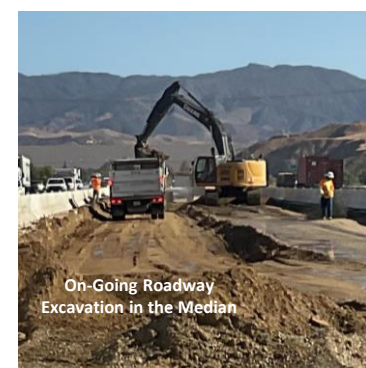
# I-5 NORTH COUNTY ENHANCEMENTS

BUDGET	Approved LOP*	Previous Period	Current Forecast
TOTAL COST	\$679.3M	\$679.3M	\$679.3M
Variance from Approved LOP:		\$0M (0%)	\$0M (0%) <span>OK</span>
Variance from Revised Budget:			\$0 <span>OK</span>

*\*At time of the award of contract – Board Approval (March 2021)*

SCHEDULE	Approved Rebaseline	(Substantial Completion) Previous Period	Current Forecast
Original July 2026	N/A	Summer 2026	Summer 2026
Variance from Original:		+0d (0%)	0d (0%) <span>OK</span>
Variance from Revised Schedule:			N/A <span>OK</span>

- **Safety:** Project Hours: 102,930; Recordable Injury Rate: 0.00 vs. The National Average: 2.4
- **Overall Project progress is 15% complete**
- Construction Stage 1, Phase 1 & 2:
  - Partial Demolition/Pile Driving/Footing and Abutment/Bent Construction on several bridges
  - Retaining Walls, Drainage, Barrier/Roadway Demo, Excavation, and Base Placement
- Project Team continues to coordinate with stakeholders: Caltrans, Federal Highway Administration (FHWA), City of Santa Clarita, Los Angeles County, CHP, NPS, CDFW, and other local stakeholders.
- Project is preparing for single-direction freeway closures in November to support Weldon Canyon bridge construction activities with the community and above stakeholders.
- **Equity:** This project is not located within or adjacent to Equity Focus Communities.



**October 2022** OK On target Possible problem (5-10% variance) Significant Impact (over 10% variance)





## Board Report

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**File #:** 2022-0662, **File Type:** Oral Report / Presentation

**Agenda Number:** 29.

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**CONSTRUCTION COMMITTEE  
OCTOBER 20, 2022**

**SUBJECT: CALTRANS QUARTERLY UPDATE**

**ACTION: RECEIVE ORAL UPDATE**

**RECOMMENDATION**

RECEIVE quarterly oral report on the status of Caltrans' construction projects.

**EQUITY PLATFORM**

All Projects are administrated by Caltrans and have gone through their own separate environmental process. Throughout the construction phase, outreach efforts consist of sending press releases to the cities, communities, media outlets, and elected offices regarding construction work. Caltrans Public Affairs unit responds to constituent inquiries. Community meetings were held prior to construction and are scheduled on an as-needed basis (i.e., upon request of stakeholders). Progress reports and updated information is posted on Caltrans and Metro websites. Every effort is made to avoid, minimize and/or mitigate construction impacts along these corridor communities. For example, most of the projects include building sound walls to mitigate noise levels at various locations throughout their respective project limits to help improve the quality of life for residents. Any unintended equity impacts that may arise will be responded to on a case-by-case basis by appropriate project partners.

# Caltrans Projects Status Report

October 2022

**Construction Committee**  
Los Angeles County Metropolitan Transportation Authority



# I-5 HOV (SR-134 to SR-118)

BUDGET	Approved	Previous	Current		SCHEDULE	Approved	(Substantial Completion)
	<u>LOP*</u>	<u>Period</u>	<u>Forecast</u>			<u>Rebaseline</u>	<u>Previous</u>
TOTAL COST	\$495M	\$544M	\$544M		Original	Summer 2022	Summer2022
Variance from Approved LOP:		\$49M (10%)	\$49M(10%)	◆	Variance from Original:		1,064 WD(118%)
Variance from Revised Budget:			0	● OK	Variance from Revised Schedule:		+1,064 WD (118%) ▲

\*Construction Capital at the award of contract

- Plant Establishment for landscaping work began on 6/20/2022.
- SB Route 5 HOV lane was opened to traffic on 07/28/2022.
- City of Burbank: AC Grind & Overlay work is scheduled to be completed in September.
- Change orders for bike lane and Northbound Empire Avenue onramp are being finalized and expected to be completed in December.



COMPLETED PORTION OF ONGOING LANDSCAPING WORK PER CITY OF BURBANK'S UNMET NEEDS



NB RTE. 5 BURBANK OFF-RAMP NEXT TO ASHLEY FURNITURE IS NEARING COMPLETION (OVER 90%)



SB RTE. 5 MAINLINES OPENED TO TRAFFIC – MAINLINE FINAL STRIPING COMPLETED: (LEFT) SB RTE. 5 BURBANK BLVD. ONRAMP / (RIGHT) SB RTE. 5 MAINLINE AT BURBANK BLVD. OVERCROSSING



October 2022  
Construction Committee



On target



Possible problem  
(5-10% variance)



Significant Impact  
(over 10% variance)



# I-5 HOV (Orange County line to I-605)

BUDGET	Approved LOP*	Previous Period	Current Forecast	
TOTAL COST	\$575.5M	\$575.5M	\$575.5M	
Variance from Approved LOP:		\$0 (0%)	\$0 (0%)	OK
Variance from Revised Budget:			\$0	OK

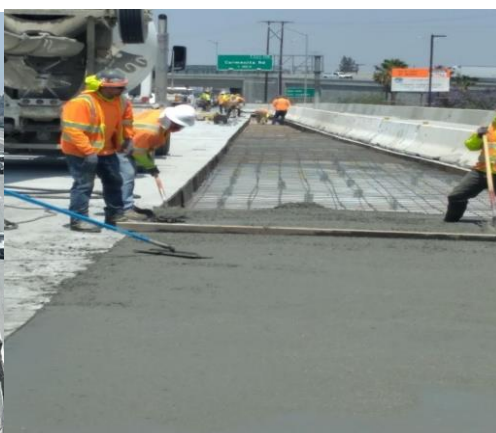
\* Construction Capital at the award of the contract

SCHEDULE	Approved Rebaseline	(Substantial Completion) Previous Period	Current Forecast	
Original Spring 2021	Summer 2022	Summer 2022	Winter 2022	
Variance from Original:		+141wd(13%)	+141wd(13%)	!
Variance from Revised Schedule:				OK

- Florence Segment was accepted in June 2022.
- All lanes including the HOV Lane on the N/B are open to public traffic between Orange County and Florence with temporary striping between Artesia and Alondra to accommodate the pavement work.
- All lanes including the HOV lane on the S/B between the 605 and Orange Co. is now open to the public.
- Valley View bridge and SB onramp was opened on 9/2/2022.
- Contractor is working on grading and paving on right lanes along Northbound directions.



Paving along NB freeway lanes



Paving Operations on NB freeway lanes



Valley View median construction

October 2022



On target



Possible problem  
(5-10% variance)




Significant Impact  
(over 10% variance)

Construction Committee



Los Angeles County Metropolitan Transportation Authority



# I-10 HOV (Segment 2)

BUDGET	Approved <u>LOP*</u>	Previous <u>Period</u>	Current <u>Forecast</u>
TOTAL COST	\$117.9M	\$117.9M	\$147.5M
Variance from Approved LOP:		\$0M (0%)	29.7M(25%) 
Variance from Revised Budget:			N/A

*\*Construction Capital at the award of contract*

SCHEDULE	Approved <u>Rebaseline</u>	(Substantial Completion) Previous <u>Period</u>	Current <u>Status</u>
<u>Original</u> Spring 2018	Spring 2020	Spring 2020	Completed
Variance from Original:		+349wd (36%)	+349wd (36%) 
Variance from Revised Schedule:			

- The project was accepted in January 2022.
- Caltrans is working with contractor to close out project.



WB 10 at Lark Ellen



WB 10 at West Covina PKWY





EB 10 at Vincent Off-ramp





# I-10 HOV (Segment 3)

BUDGET	Approved <u>LOP*</u>	Previous <u>Period</u>	Current <u>Forecast</u>
TOTAL COST	\$197.3M	\$197.3M	\$209.0M
Variance from Approved LOP:		\$0M (0%)	11.7M (6%)
Variance from Revised Budget:			

*\*Construction Capital at the award of contract*

SCHEDULE <u>Original</u>	Approved <u>Rebaseline</u>	(Substantial Completion) <u>Previous Period</u>	<u>Current Status*</u>
Summer 2021	Feb 2022	Feb 2022	Completed
Variance from Original:		+91wd (7%)	+91wd (7%)
Variance from Revised Schedule:			

*\*Completed*

- Contract was accepted in June 2022.
- Caltrans is working with contractor to close out project.



West Covina Logo along WB Direction West of Holt UC



Full freeway view



Overhead sign structure at Kellogg Hill

# SR-71 South Segment

BUDGET	Approved <u>LOP*</u>	Previous <u>Period</u>	Current <u>Forecast</u>
TOTAL COST	\$124.1M	\$124.1M	\$124.1M
Variance from Approved LOP:		\$0M (0%)	\$0M (0%) <span style="color: green;">OK</span>
Variance from Revised Budget:			\$0 <span style="color: green;">OK</span>

*\*Construction capital at the award of contract*

SCHEDULE	Approved <u>Rebaseline</u>	(Substantial Completion) <u>Previous Period</u>	<u>Current Forecast*</u>
<u>Original</u> Spring 2024	N/A	Spring 2024	Fall 2024 <span style="color: yellow;">◇</span>
Variance from Original:		+0 wd (0%)	pending <span style="color: yellow;">◇</span>
Variance from Revised Schedule:			N/A <span style="color: green;">OK</span>

*\*Current Forecast is based on risk; project team is working with the contractor to mitigate the risk*

- Drainage System 11-7 (RCB) is approximate 50% complete, should be completed by the end of October 2022.
- Southern California Edison utility conflicts have been resolved.
- Working with contract to determine overall delay to schedule due to Environmental & Hazardous Materials delay.
- Currently working on re-staging for lane shift as proposed by contractor, with a proposed time savings with new staging.



Excavation for DS 11-7 (RCB) – SB71



DS 11-7 Double Box RCB



Sewer Siphon Structure



SW161 CIDH Pile



RCB Excavation Shoring

October 2022



On target



Possible problem  
(5-10% variance)



Significant Impact  
(over 10% variance)

Construction Committee

Los Angeles County Metropolitan Transportation Authority





# SR-138 Segment 6

BUDGET	Approved LOP*	Previous Period	Current Forecast
TOTAL COST	\$15M	\$15M	\$15M
Variance from Approved LOP:		0M(0%)	\$0M (0%) <span>OK</span>
Variance from Revised Budget:			\$0 <span>OK</span>

\*Construction capital at the award of contract

SCHEDULE	Approved Rebaseline	(Substantial Completion) Previous Period	Current Status *
Original Fall 2021	N/A	Fall 2021	Summer 2022
Variance from Original:		+0d (0%)	0d (0%) <span>OK</span>
Variance from Revised Schedule:			N/A <span>OK</span>

\*Current Forecast assumes no full panel replacement for DWR canal

- Construction work substantially complete. Dept. of Water Resources (DWR) Canal crack repair completed, contractor working on remaining minor punch list item completed on September 6<sup>th</sup>.
- DWR walk through inspection of canal slab repair to be performed on 9/1/2022, 11:00 am. DWR inspector signed off on repair and DWR will send formal acceptance letter.
- Project Safety Review has been initiated, waiting on comments. Maintenance and Contractor perform final walk-through inspection the week of September 5<sup>th</sup>-9<sup>th</sup>.



Completed Bridge Work at California Aqueduct

California Aqueduct

Channel Lining Cracks

SR-138 Roadway Completed

October 2022



On target



Possible problem  
(5-10% variance)



Significant Impact  
(over 10% variance)

Construction Committee

Los Angeles County Metropolitan Transportation Authority



# I-405 Crenshaw Aux Lane

BUDGET	Approved <u>LOP*</u>	Previous <u>Period</u>	Current <u>Forecast</u>
TOTAL COST	\$62.0M	\$62.0M	\$62.0M
Variance from Approved LOP:		\$0M (0%)	\$0M (0%) <span style="color: green;">OK</span>
Variance from Revised Budget:			N/A <span style="color: green;">OK</span>

*\*Construction capital at the award of contract*

SCHEDULE <u>Original</u>	Approved <u>Rebaseline</u>	(Substantial Completion) <u>Previous Period</u>	<u>Current Forecast</u>
Spring 2024	N/A	Spring 2024	Spring 2024
Variance from Original:		0 wd (0%)	0 wd (0%) <span style="color: green;">OK</span>
Variance from Revised Schedule:			N/A <span style="color: green;">OK</span>

- Contractor currently working on retaining walls # 808 and #815.
- Bridge widening at Van Ness Ave. OC.
- No major issues.



RW 815 – SB 405 Crenshaw Blvd off ramp widening – Looking South



RW 815 and RW 808 – SB 405 Crenshaw Blvd off ramp widening – Looking South



NE side of Van Ness Ave Bridge Widening showing CIDH for footing – looking South



North side of Van Ness Bridge Widening showing bridge demo work – Looking North

October 2022



On target



Possible problem  
(5-10% variance)



Significant Impact  
(over 10% variance)

Construction Committee

Los Angeles County Metropolitan Transportation Authority

