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APRIL 1, 1997

Los Angeles County
Metropolitan
Transportation
Authority

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Los Angeles, CA
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213.922.6000

TO: BOARD OF DIRECTORS

FROM: LINDA BOHLINGER *Linda Bohlinger*
INTERIM CHIEF EXECUTIVE OFFICER

SUBJECT: APPROVE AMENDMENT TO CONTRACT WORK ORDER
FOR CHANGES TO CONSTRUCTION MANAGEMENT
SERVICES ON THE PASADENA BLUE LINE

RECOMMENDATION

Approve Amendment No. 5 to Contract Work Order (CWO) No. 1 for Contract MC013 with Managers of Transit Construction (MTC), in the amount of \$43,000 for a revised total Not-To-Exceed (NTE) amount of \$19,820,936. This action does not require an increase to the current Board approved Authorization for Expenditure (AFE) of \$20,352,884.

Within Construction Committee authority: Yes No

ORGANIZATIONAL IMPACT

The Consultant provided staff support services to the MTA during a time the MTA was not able to perform the services in house with existing staff. This action is part of Contracts' activities to complete all open Consultant Change Notices (CCNs).

BUDGET IMPACT

The funds for this action are available within the MTA Board approved Project Budget of \$803,868,500.

This recommended action will increase the current contract (MC013) value of \$19,852,884 by \$43,000 to \$19,895,884. The forecast final cost, including in-process CCNs and other anticipated changes for this contract is \$66,190,500. The current status of the contract, including the impact of the recommended action, cost and forecast is shown in Attachment 1. The recommended action does not impact the MTA Fiscal Year budget or the Sources of Funds, either in the fiscal year or over the life of the project.

Potential for Cost Recovery: Yes No

ALTERNATIVES CONSIDERED

There are no viable alternatives. The Consultant provided support services when the MTA did not have staff to perform the services in-house.

BACKGROUND

This action is for the following Consultant Change Notices (CCN):

- CCN #3.00 provided systems engineering support from August 31, 1995, through January 31, 1996. MTC proposed no increase (\$0) to the Contract NTE amount. The MTA was in the process of hiring a permanent employee and has since filled that position.
- CCN #4.00 provided public relations support staff for continued efforts in the communities of Highland Park, South Pasadena, and Pasadena for the period of April 1, 1996, through June 30, 1996, for the NTE amount of \$33,000. The MTA did not have an available employee to perform the services at the time. The public relations function is now in-house.
- CCN #5.00 provided a review of the MTA's CM procedures, P3 interface, and developed specific recommendations for the purpose of creating a Project Control Guidebook that allows for automated management of the Master Schedule Database. The MTA issued a WACN with an NTE amount of \$10,000. Consultant performed work from May 1, 1996, through August 31, 1996. Consultant exceeded the NTE amount without MTA authorization. The MTA will only reimburse costs up to the \$10,000 NTE ceiling.
- CCN #7.00 provided continued public affairs support staff from September 29, 1996, through December 29, 1996. MTC proposed no increase (\$0) to the Contract NTE amount. The MTA now has a full time employee to perform these services.
- CCN #8.00 provides the services of a Safety Manager from September 1, 1996, through June 30, 1997. MTC proposed no increase (\$0) to the Contract NTE amount. MTA Construction Safety has had to assign its designated Safety Manager to another project.

See Attachment 2, Additional Background, for summary of the CWOs issued.

SMALL BUSINESS PARTICIPATION

The Contract has a M/WBE participation goal of 41.6% and 10.7%, respectively. The current M/WBE participation, as determined by MTA's EO Programs Departments' Contract Compliance Unit, is 31.4% and 9.5%, respectively. See Attachment 3 for more details.

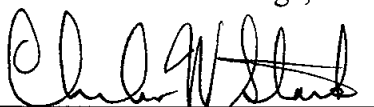
ATTACHMENTS

Attachment 1 - Current Contract Status, Attachment 2 - Additional Background

Attachment 3 - Additional SBE Participation Discussion

Attachment 4 - Cumulative Summary of Construction Committee Approvals

Prepared by: David J. Sievers, P. E., Deputy Executive Officer/Project Manager
Ivan A. Page, Senior Contract Administrator



Charles W. Stark
Interim Executive Officer, Construction

ATTACHMENT 1
PROFESSIONAL SERVICES CONTRACT VALUE STATUS
R05 - Metro Blue Line - Pasadena

MC013 - MANAGERS OF TRANSIT CONSTRUCTION (MTC)
CONTRACT WORK ORDER #00 - AMENDMENT #11

PROJECT CUMULATIVE CWO VALUE FOR CONTRACT MC013

1. TOTAL INITIAL CWO VALUE:	\$3,005,368
2. TOTAL PREVIOUS AMENDMENTS:	\$16,847,516
3. TOTAL CURRENT CONTRACT VALUE (1 + 2)	\$19,852,884
4. VALUE OF THIS AMENDMENT	\$43,000
5. PROPOSED BOARD APPROVED CONTRACT VALUE (3 + 4)	\$19,895,884
6. STAFF APPROVED CCR NTE VALUE	\$43,000
7. AWA NTE'S INCLUDED IN AMENDMENT	\$43,000
8. AWA NTE'S IN OUTSTANDING CCR'S (6-7)	\$0
9. NEW CONTRACT EXPENDITURE CEILING (5 + 8)	\$19,895,884

AUTHORIZATION FOR EXPENDITURE STATUS : TOTAL PROJECT R05 MC013

10. EXPENDED TO DATE	\$10,218,351	
11. UNEXPENDED CWO VALUE (9-10)	\$9,677,533	
12. NTE ALLOWANCE (See Note)	\$457,000	
13. PROPOSED AFE (5 + 12)	\$20,352,884	*
14. CURRENT AFE	\$20,352,884	
15. AFE ADJUSTMENT REQUIRED (13-14)	\$0	Not Required

BUDGET STATUS : TOTAL PROJECT R05 MC013

16. CURRENT CONTRACT BUDGET	\$65,640,200	
17. PROPOSED BOARD APPROVED CONTRACT VALUE	\$19,895,884	
18. OUTSTANDING CCR'S	\$0	as of 03/27/97
19. TRENDS AND CONTINGENCIES	\$46,294,616	
20. FORECAST FINAL COST (17 + 18 + 19)	\$66,190,500	as of [1]

REVIEWED BY: 

* - Allows future WACN NTE authorizations up to: \$457,000
[1] Forecast will be revised end of April

ATTACHMENT 1
PROFESSIONAL SERVICES CONTRACT VALUE STATUS
R05 - Metro Blue Line - Pasadena

MC013 - MANAGERS OF TRANSIT CONSTRUCTION (MTC)
CONTRACT WORK ORDER #01 - AMENDMENT #05

CWO STATUS: CONTRACT WORK ORDER 1.00

1. INITIAL CWO VALUE:	\$2,980,368
2. PREVIOUS AMENDMENTS	\$16,797,568
3. CURRENT CWO VALUE (1 + 2)	\$19,777,936
4. VALUE OF THIS AMENDMENT	\$43,000
5. PROPOSED BOARD APPROVED CWO VALUE (3 + 4)	\$19,820,936
6. STAFF APPROVED CCN NTE VALUE	\$43,000
7. CCN NTE'S INCLUDED IN AMENDMENT	\$43,000
8. CCN NTE'S IN OUTSTANDING CCN'S (6-7)	\$0
9. NEW CWO EXPENDITURE CEILING (5 + 8)	\$19,820,936

CWO STATUS: CONTRACT WORK ORDER 3.00

1. INITIAL CWO VALUE:	\$25,000
2. PREVIOUS AMENDMENTS	\$49,948
3. CURRENT CWO VALUE (1 + 2)	\$74,948
4. VALUE OF THIS AMENDMENT	\$0
5. PROPOSED BOARD APPROVED CWO VALUE (3 + 4)	\$74,948
6. STAFF APPROVED CCN NTE VALUE	\$0
7. CCN NTE'S INCLUDED IN AMENDMENT	\$0
8. CCN NTE'S IN OUTSTANDING CCN'S (6-7)	\$0
9. NEW CWO EXPENDITURE CEILING (5 + 8)	\$74,948

REVIEWED BY: *gaf*

ATTACHMENT # CONSULTANT CHANGE NOTICES

CONSULTANT: MANAGERS OF TRANSIT CONSTRUCTION (MTC)

CONTRACT:MC013 CONSTRUCTION MANAGEMENT CONSULTANT

AMEND #	PROJECT	CCN NO.	CHANGE TITLE	NEGOTIATED VALUE	CCN APPROVED DATE	AMENDMENT DATE	BOARD NOTICE DATE
R05 - Metro Blue Line - Pasadena							
CWO #: 1.00							
5	R05	3.00	SYSTEMS ENGINEERING SUPPORT	\$0.00	03/26/97		
5	R05	4.00	REVISION COMPLETION DATE FOR C6430/PROVIDE PUBLIC RELATIONS SUPPORT STAFF	\$33,000.00	01/27/97		
5	R05	5.00	DEVELOP PROJECT CONTROL GUIDEBOOK TO MANAGE MASTER SCHEDULE DATA BASE	\$10,000.00	03/20/97		
5	R05	7.00	PUBLIC AFFAIRS CONSULTANT EXTENSION	\$0.00	01/27/97		
5	R05	8.00	EXTENSION OF PASADENA BLUE LINE SAFETY SERVICES	\$0.00	03/12/97		
TOTAL CWO 1.00:				\$43,000.00			
TOTAL PROJECT R05:				\$43,000.00			
TOTAL CONTRACT MC013:				\$43,000.00			



CONSULTANT CHANGE BOARD EXECUTIVE SUMMARY

CCN#: 3.00

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CONTRACT # / TITLE: MC013 / CONSTRUCTION MANAGEMENT CONSULTANT

CONSULTANT: MANAGERS OF TRANSIT CONSTRUCTION (MTC)

AMENDMENT #: 5 - CWO 1.00 PROJECT R05 - Metro Blue Line - Pasadena

<u>CCN NUMBER</u>	<u>TITLE</u>	<u>CCN VALUE</u>	<u>CCN HOURS</u>
		\$0.00	

3.00 SYSTEMS ENGINEERING SUPPORT

WHO IDENTIFIED:

Project Manager - MTA.

PERIOD OF PERFORMANCE:

August 1, 1995 through January 31, 1996.

WHAT:

Provide system engineering support.

JUSTIFICATION:

MTA is in the process of hiring a permanent employee for the position of systems engineering support. Until the position has been filled, a staff member from MTC, is to continue providing systems engineering support.

COST IMPACT:

This change is within the Pasadena Blue Line R05 Project budget. There is no cost recovery potential.



CONSULTANT CHANGE BOARD EXECUTIVE SUMMARY

CCN#: 4.00

PAGE 1

CONTRACT # / TITLE: MC013 / CONSTRUCTION MANAGEMENT CONSULTANT

CONSULTANT: MANAGERS OF TRANSIT CONSTRUCTION (MTC)

AMENDMENT #: 5 - CWO 1.00 PROJECT R05 - Metro Blue Line - Pasadena

<u>CCN NUMBER</u>	<u>TITLE</u>	<u>CCN VALUE</u>	\$33,000.00
		<u>CCN HOURS</u>	486
4.00	REVISION COMPLETION DATE FOR C6430/PROVIDE PUBLIC RELATIONS SUPPORT STAFF		

WHO IDENTIFIED:

WILLIAM C. JORGENSEN, PROJECT MANAGER, MTC

PERIOD OF PERFORMANCE:

COMPLETION FOR C6430 IS REVISED FROM 11/30/95 TO 06/30/96. PUBLIC RELATIONS SUPPORT STAFF WOULD COMMENCE ON 04/01/96 AND END ON 06/30/96.

WHAT

REVISE THE COMPLETION DATE IN CWO #1, REV. 2 FOR FIELD STAFF SUPPORTING THE C6430 ARROYO SECO BRIDGE RECONSTRUCTION CONTRACT FROM 11/30/95 TO 6/30/96. PROVIDE PUBLIC RELATIONS SUPPORT STAFF FROM READ COMMUNICATIONS FOR CONTINUED EFFORT IN THE COMMUNITIES OF HIGHLAND PARK, SOUTH PASADENA AND PASADENA. SUPPORT FOR PUBLIC RELATIONS WOULD COMMENCE ON 4/1/96 AND END ON 6/30/96.

JUSTIFICATION

THE C4630 CONTRACT EXPERIENCED START-UP DELAYS DUE TO AN EXTENDED BID OPENING AND LEAD ABATEMENT PROBLEM. IN ADDITION, APPROXIMATELY 3 MONTHS OF TIME EXTENSIONS HAVE BEEN ISSUED DURING CONSTRUCTION THAT HAVE EXTENDED THE ANTICIPATED COMPLETION DATE TO 5/23/96. THE DELAY TO THIS CONTRACT WAS NOT ACCOUNTED FOR IN THE CONSTRUCTION MANAGER'S SCOPE OF SERVICES FOR CWO #1, REV. 2. THIS CHANGE PROVIDES FOR A TIME EXTENSION FOR THIS DELAY. THE PUBLIC RELATIONS SUPPORT STAFF INCREASE WAS AT THE REQUEST OF JIM RETANA, PUBLIC RELATIONS, MTA.

ADDITIONAL JUSTIFICATION FOR CONSULTANT REQUEST FOR CHANGE

C6430: MTC'S CWO #1, REV. 1, STAFFING PLAN FOR C6430 INDICATED THAT FIELD STAFF WILL HAVE STARTED ON 7/1/94 AND COMPLETED ON 11/30/95. ACTUAL STAFFING BEGAN ON 7/1/94 AND IS ESTIMATED TO BE COMPLETE ON 6/3/96. THE TIME EXTENSION FROM 11/30/95 TO 6/30/96 IS JUSTIFIED DUE TO THE FOLLOWING ITEMS WHICH OCCURRED AFTER THE FIELD STAFF WAS MOBILIZED:

- MTA EXTENDED BID OPENING/REVIEW/AWARD PERIOD.



CCN#: 4.00

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CONTRACT # / TITLE: MC013 / CONSTRUCTION MANAGEMENT CONSULTANT

CONSULTANT: MANAGERS OF TRANSIT CONSTRUCTION (MTC)

AMENDMENT #: 5 - CWO 1.00 PROJECT R05 - Metro Blue Line - Pasadena

<u>CCN NUMBER</u>	<u>TITLE</u>	<u>CCN VALUE</u>	\$33,000.00
		<u>CCN HOURS</u>	486

4.00 REVISION COMPLETION DATE FOR C6430/PROVIDE PUBLIC RELATIONS SUPPORT STAFF

- MTA DELAYED CONTRACT NTP DUE TO LEAD ABATEMENT PROBLEMS.
- 3 MONTHS TIME EXTENSIONS OWED TO THE CONTRACTOR DUE TO CHANGES IN THE FIELD.

THE FIELD STAFF STARTED WHEN PLANNED, BUT THE COMPLETION OF THE CONTRACT HAS BEEN DELAYED. THEREFORE THE FIELD STAFF TIME FRAME MUST BE EXTENDED TO THE NEW ESTIMATED COMPLETION DATE.

COST IMPACT

A COST INCREASE FOR THE TIME EXTENSION FOR C6430 IS NOT ANTICIPATED SINCE THE CONSTRUCTION MANAGER IS UNDER BUDGET FOR THE SUBJECT CWO. THE ROM COST FOR PUBLIC RELATIONS SUPPORT STAFF IS \$33,000.



CONSULTANT CHANGE BOARD EXECUTIVE SUMMARY

CCN#: 5.00

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CONTRACT # / TITLE: MC013 / CONSTRUCTION MANAGEMENT CONSULTANT

CONSULTANT: MANAGERS OF TRANSIT CONSTRUCTION (MTC)

AMENDMENT #: 5 - CWO 1.00 PROJECT R05 - Metro Blue Line - Pasadena

<u>CCN NUMBER</u>	<u>TITLE</u>	<u>CCN VALUE</u>	\$10,000.00
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		<u>CCN HOURS</u>	
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5.00	DEVELOP PROJECT CONTROL GUIDEBOOK TO MANAGE MASTER SCHEDULE DATA BASE		
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WHO IDENTIFIED:

S. PIERCE, P.C.M., DON McNATTY, CONSULTANT

PERIOD OF PERFORMANCE:

This change request includes approximately 300 manhours to occur over a three month period of performance between May 1, 1996 through July 31, 1996.

WHAT

Provide staff assistance to create automated links between Primavera and other software in use by MTA for the purpose of automated management of MTA's Master Schedule Database. Develop Project Control Guidebook to provide user information to MTA staff. Provide training and assistance to MTA staff at implementation.

JUSTIFICATION

The current programming does not provide a relational database. As a result, considerable manhours are expended in preparing master scheduling scenarios. This change is requested to provide staff assistance to the MTA in linking these programs so changes made to the master schedule adjust automatically. The scope of work identified in this Request for Change is not included in the original CM Scope of Services.

COST IMPACT

The cost of this change is anticipated to be approximately \$38,240.



CONSULTANT CHANGE BOARD EXECUTIVE SUMMARY

CCN#: 7.00

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CONTRACT # / TITLE: MC013 / CONSTRUCTION MANAGEMENT CONSULTANT

CONSULTANT: MANAGERS OF TRANSIT CONSTRUCTION (MTC)

AMENDMENT #: 5 - CWO 1.00 PROJECT R05 - Metro Blue Line - Pasadena

<u>CCN NUMBER</u>	<u>TITLE</u>	<u>CCN VALUE</u>	\$0.00
		<u>CCN HOURS</u>	

7.00 PUBLIC AFFAIRS CONSULTANT EXTENSION

WHO IDENTIFIED:

J. Retana, Pasadena Blue Line/Public Affairs

PERIOD OF PERFORMANCE:

The period of performance extension is from September 29, 1996 through December 29, 1996.

WHAT:

MTA Public Affairs/Construction is requesting an extension of Mr. Robert Perez's contract with MTA. Mr. Robert Perez is a Public Affairs consultant employed by Read Communications sub-contracted to MTC (Construction Manager for the Pasadena Blue Line).

JUSTIFICATION:

Mr. Robert Perez is currently assigned to Public Affairs/Construction with the Pasadena Blue Line Project as a Community Relations Consultant. During the past five months he has participated in many community events, meetings and workshops along the entire Blue Line alignment. He has developed a strong working relationship with the project team and the community, offering invaluable advise and fresh ideas into improving community relations and good will, image building for the MTA, and generating interest and excitement for the Blue Line Project.

In September Public Affairs will need to staff a full time community relations person at a field office in Highland Park. Mr. Perez knows the issues in that area, and has cemented a working relationship with active community members. Currently one other Public Affairs officer is assigned to the project, but only 50% of the time due to other assignments. As of January 1997 it has been requested that the Public Affairs officer be on board 100%.



CONSULTANT CHANGE BOARD EXECUTIVE SUMMARY

CCN#: 8.00

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CONTRACT # / TITLE: MC013 / CONSTRUCTION MANAGEMENT CONSULTANT

CONSULTANT: MANAGERS OF TRANSIT CONSTRUCTION (MTC)

AMENDMENT #: 5 - CWO 1.00 PROJECT R05 - Metro Blue Line - Pasadena

<u>CCN NUMBER</u>	<u>TITLE</u>	<u>CCN VALUE</u>	<u>CCN HOURS</u>
		\$0.00	

8.00 EXTENSION OF PASADENA BLUE LINE SAFETY SERVICES

WHO IDENTIFIED:

Dan Jackson, Director, Construction Safety

PERIOD OF PERFORMANCE:

Extend the services of the MTA Safety Manager through **June 30, 1997**.

WHAT:

MTA requests that the services of Safe Work, Inc. (G. Marcotte) be extended through November 1996.

JUSTIFICATION:

Efforts to hire an MTA Safety Manager are underway, however, completion of the hiring process is not expected until October 1996. Since the current safety services provided by Safety Works is due to expire September 30, 1996, there would be no opportunity for phasing in the new employee. Extending the Safety Works, Inc. employee through **June 30, 1997** will enable our new manager the opportunity to become familiar with all aspects of the Pasadena operations while also providing services to the Segment-3 East Side extension.

COST IMPACT:

There is no cost recovery potential associated with this change.

ATTACHMENT 2

ADDITIONAL BACKGROUND

On December 15, 1993, the MTA Board approved the selection of MTC and authorized the issuance of a contract. CWO No. 1, Amendments 0 and 1 authorized the Construction Manager's (CM) Project Management services for Fiscal Years 1994-95 and Resident Engineer (RE) services for the Los Angeles River Bridge and Arroyo Seco Bridge Reconstruction contract. CWO No. 1, Amendment 2 authorized RE services for the Reconstruction and Retrofit of Steel and Concrete Bridges and to provide CM Project Management Services for the first six (6) months of FY96. CWO No. 1, Amendment 3 authorized CM Project Management Services for the second six (6) months of FY96 plus CCN No. 002 for Value Engineering Support and Cost Estimating review. CWO No. 1, Amendment 4 authorized CM Project Management services for FY97.

ATTACHMENT 3

ADDITIONAL SBE PARTICIPATION DISCUSSION

M/WBE participation is lower than anticipated for several reasons. The volume of construction on the Pasadena Blue Line, since awarding this contract on December 15, 1993, is less than originally estimated. The lower volume of construction has impacted the volume of work given to all subcontractors including the M/WBE subcontractors. In addition, during 1996 the MTA assumed responsibility for safety, quality assurance and public relations. In the past, the Construction Manager performed that work. MTC had subcontracted that work to M/WBE firms.

MTC's plan to meet the goal includes nineteen (19) M/WBE firms. Seventeen (17) M/WBE firms have performed all or a portion of their identified work scope. Two (2) firms, listed below, have not yet performed any portion of their identified work scope. They should perform the work at a later date when the volume of construction on the project increases.

- D'Leon Consulting Engineers for Resident Engineering and Inspection services and 2.3% of the goal.
- William J. Yang & Associates for Mechanical/Electrical Support and 0.1% of the goal.

MTA action taken to resolve issues that currently impact the funding for the Pasadena Blue Line Project may further impact future M/WBE participation. One example is a plan to consolidate the total number of construction contracts down to twenty-two (22) from a previous plan for forty-three (43) contracts.

The Contract does include a provision for an assessment against MTC should they not meet the goal. The provision allows contract payments to be reduced by \$500 per day from the date the Consultant is found to be in non-compliance until compliance is either attained or excused, or by an amount equal to the difference between the Consultants M/WBE percentage goal commitments and the actual percentage attained, multiplied by the assessment amount on the sliding scale in the contract, whichever is greater. The sliding scale is based on contract value.

When considering the amount expended through January 31, 1997 by MTC and the value associated with MBE/WBE firms, the participation percentage calculates as follows:

Total Billing through 1/31/97:	\$15,466,400
Total Paid to MBEs:	\$ 6,389,821
Total Paid to WBEs:	\$ 2,223,692

MBE participation =	41.3%
WBE participation =	14.4%

ATTACHMENT 4

CONSTRUCTION COMMITTEE APPROVALS

Contract #	Contractor	Original Value	Value of Committee Changes to Date	Value of Current Change	Cumulative Value of Changes Approved by Committee
MC013	MANAGERS OF TRANSIT CONSTRUCTION	\$0	\$0	\$43,000	\$43,000