

**PRELIMINARY SCOPE OF WORK**  
**PROJECT MANAGEMENT SERVICES FOR**  
**CAPITAL IMPROVEMENT PROJECTS**  
**SJCDPW-RFP-25-05**

The San Joaquin County Department of Public Works (SJCDPW) requests technical proposals from qualified project management (PM) firms to undertake, perform, and complete the tasks set forth in the Request for Proposals (RFP). The requested SERVICES will involve two distinct federal-aid projects. Responses to this RFP should include work effort separately addressing both projects as described in this Preliminary Scope of Work. The selected PM firm will perform professional project management services for the design and right-of-way phases of the Grant Line Road Realignment Project, Federal Aid Project CPFCDL-5929(342) (Realignment project) and all phases from project initiation through final design and right-of-way for the State Route 26 and Jack Tone Road Intersection Improvements Project, Federal Aid Project CML-5929(306) (Roundabout project).

The selected PM firm will be the highest-ranking firm that has successfully negotiated the terms for the award of a consultant services agreement for each project. There will be separate consultant services agreement for each project. The selected PM firm will be requested to enter into consultant services agreements with San Joaquin County (County). All work shall comply with San Joaquin County Policies, Caltrans' Local Assistance Procedure Manual (LAPM), and all other relevant Federal, State, and SJCDPW requirements.

The PM firm chosen will augment SJCDPW staff by performing the following services for each project, as applicable:

- Assist the Senior Transportation Engineer by leading the day-to-day management of both projects included in this RFP;
- Review project submittals to ensure compliance with all relevant standards;
- Act as the County's representative to outside involved jurisdictions including Union Pacific Railroad (UPRR), the City of Tracy, and Caltrans to facilitate timely coordination and review of project documents, as needed;
- Ensure compliance with the National Environmental Policy Act (NEPA) and the California Environmental Quality Act (CEQA) for all new required documentation;
- Assist with preparation and/or review of grants to secure funding for projects as needed;
- Ensure compliance with all Caltrans policies and procedures for the Roundabout project, including acting as the County's project manager in all project development team (PDT) duties;
- Oversee consultants' preparation of right-of-way documentation; and
- Oversee consultants' preparation of Plans, Specifications, and Estimates (PS&E) and any other items required for project advertisement.

The PM firm will be required to provide all necessary labor, equipment, tools, and facilities necessary for the completion of the requested professional services for both projects. The team proposed by the firm shall include only the individual(s) required to perform the tasks described in this scope of work in an efficient manner and shall clearly identify a secondary contact in the event the primary project manager is unavailable for any reason.

A proposal submitted in response to this RFP will include a work plan that demonstrates the PM firm's understanding of this Preliminary Work Scope and that refines and/or expands it to reflect the PM firm's approach to completing the work. The PM firm's work plan will also demonstrate the capability to complete the required work throughout the projected forty-eight (48) month schedule, beginning with the Notice to Proceed.

The PM firm will provide a detailed schedule for the work, showing the task sequence, time required for each task and subtask, and total time estimated to perform the work. Services to be provided by the PM firm staff will include, but are not limited to the following:

## **PROJECT MANAGEMENT SERVICES FOR GRANT LINE ROAD REALIGNMENT, FEDERAL AID PROJECT CPFCDL-5929(342)**

### **TASK 1.0 REALIGNMENT PROJECT GENERAL MANAGEMENT**

#### **TASK 1.1 GENERAL PROJECT MANAGEMENT AND CONSULTANT OVERSIGHT MEETINGS**

This task includes all general project management of the Realignment project. Project management under this item includes management and tracking of project budget, administrative costs, project progress reporting, and project management coordination with SJCDPW directly related to the Realignment project. The progress reports shall include progress-to-date, work completed over the invoiced period, outstanding project action items, problems encountered along with suggested solutions, and anticipated work for the next month.

The PM firm shall meet on a regular basis with SJCDPW on a schedule no more frequently than weekly and not to exceed monthly. The meetings shall be scheduled in a manner to ensure that timely progress is made toward advertising both projects for construction.

The PM firm shall also assist SJCDPW with the consultant selection process for the Realignment project under this task. This work shall include the review and initial ranking of all proposals received and participation in both interview panels to select consultants for each project.

The PM firm will be expected to meet with the management team of the Realignment project on a monthly basis. The PM firm shall also attend any public outreach meetings, including one-on-one meetings with key stakeholders on behalf of the County, and any meeting required with outside jurisdictions, specifically UPRR and the City of Tracy.

For the purposes of this work task, an average of three meetings every month is expected for the entire 48-month duration of the contract.

#### **TASK 1.2 DESIGN OVERSIGHT**

The PM firm shall oversee all PS&E activities of the consultant selected for the Realignment project as necessary to successfully advertise and award the work. This task includes review of all memoranda, working papers, reports, plans and drawings for the Realignment project. Quality control procedures will be in effect during the entire time work is being performed for the Project. The quality control procedures will establish a process whereby all work product submittals to the County are independently checked by the PM firm.

Work on the Realignment project will be primarily focused on PS&E activities including preparation of 30%, 60%, 90% and 100% submittals. The PM firm shall review all documents related to each submittal, including but not limited to plans, drawings and engineer's estimates. Key submittals are anticipated to include roadway improvement plans, pavement striping and traffic signage, construction staging plans, drainage plans, and grade separation plans. The PM firm shall identify qualified staff to complete all anticipated reviews and QA/QC for this task.

### **TASK 1.3 ENVIRONMENTAL OVERSIGHT**

The PM firm shall oversee all Environmental activities of the consultant selected for the Realignment project as necessary to successfully advertise and award the work. This task will require oversight of the preparation and approval of complete NEPA clearance for the Realignment project. The PM firm will need to work closely with the consultant and Caltrans environmental staff to ensure timely completion of NEPA clearance. This task will also require revalidation of the existing CEQA clearance as approved by the County in 2018.

### **TASK 1.4 RIGHT-OF-WAY OVERSIGHT**

The PM firm shall oversee all Right-of-Way activities of the consultants selected for the Realignment project as necessary to successfully acquire the necessary property required to construct the project. This task shall include reviewing any exhibits for proposed easements and acquisition prepared by the design consultant for accuracy and adherence to State and County laws, and all preliminary title reports, referenced deeds and maps, and legal descriptions necessary for property acquisition. Coordination with UPRR to secure an easement for the Realignment project's new crossing will also be required. The PM firm shall coordinate with SJCDPW Real Property staff and may be required to assist the design consultant to coordinate field meetings with affected property owners.

### **TASK 1.5 BIDDING AND POST AWARD ASSISTANCE**

The PM firm shall provide assistance during the advertising and bidding phase of the Realignment project. Assistance will involve coordinating with the design consultant to provide clarification or answers to questions received from prospective bidders. This assistance could include coordinating necessary design revisions if SJCDPW deems it necessary. SJCDPW shall be responsible for receiving all inquiries and providing all responses to questions received during the bidding period.

## **PROJECT MANAGEMENT SERVICES FOR STATE ROUTE 26 AND JACK TONE ROAD INTERSECTION IMPROVEMENTS, FEDERAL AID PROJECT CML-5929(306)**

### **TASK 1.0 ROUNDABOUT PROJECT GENERAL MANAGEMENT**

#### **TASK 1.1 PROJECT MANAGEMENT AND CONSULTANT OVERSIGHT MEETINGS**

This task includes all general project management of the Roundabout project. Project management under this item includes management and tracking of project budget, administrative costs, project progress reporting, and project management coordination with SJCDPW directly related to the Roundabout project. The progress reports shall include progress-to-date, work completed over the invoiced period, outstanding project action items, problems encountered along with suggested solutions, and anticipated work for the next month.

The PM firm shall meet on a regular basis with SJCDPW on a schedule no more frequently than weekly and not to exceed monthly. The meetings shall be scheduled in a manner to ensure that timely progress is made toward advertising both projects for construction.

The PM firm shall also assist SJCDPW with the consultant selection process for the Roundabout project under this task. This work shall include the review and initial ranking of all proposals received and participation in both interview panels to select consultants for each project.

The PM firm will be expected to meet with the management team of the Roundabout project on a monthly basis. The PM firm shall also attend any public outreach meetings, including one-on-one meetings with key stakeholders on behalf of the County, and any focused meetings required by Caltrans.

For the purposes of this work task, an average of one meeting is expected each month with SJCDPW for the entire 48-month duration of the contract, one PDT meeting with Caltrans is expected each month after selection of a consultant for a period of three years, with an additional ten to twenty meeting anticipated for other items noted in this task.

#### **TASK 1.2      DESIGN OVERSIGHT**

The PM firm shall oversee all PS&E activities of the consultant selected for the Roundabout project as necessary to successfully advertise and award the work. This task includes review of all memoranda, working papers, reports, plans and drawings for the Roundabout project. Quality control procedures will be in effect during the entire time work is being performed for the Project. The quality control procedures will establish a process whereby all work product submittals to the County are independently checked by the PM firm. All work under this task shall conform to current standard Caltrans procedures and milestones.

Work on the Roundabout project will include all stages of project development, beginning with project initiation with Caltrans and continuing through project ready-to-list and advertisement. The PM firm shall review all documents related to each submittal, including those required for each relevant Caltrans milestones. Coordination with Caltrans will be essential for successful completion of this task. The PM firm shall identify qualified staff to complete all anticipated reviews and QA/QC for this task.

#### **TASK 1.3      ENVIRONMENTAL OVERSIGHT**

The PM firm shall oversee all Environmental activities of the consultants selected for the Roundabout project as necessary to successfully advertise and award the work. This task will require oversight of the preparation and approval of Environmental clearance for the Roundabout project as specified by Caltrans. It is expected that Caltrans staff will be lead on any environmental work required for CEQA and NEPA clearance, and the PM firm will need to work closely with Caltrans environmental staff to ensure timely completion of any required studies or work.

#### **TASK 1.4      RIGHT-OF-WAY OVERSIGHT**

The PM firm shall oversee all Right-of-Way activities of the consultants selected for the Roundabout project as necessary to successfully acquire the necessary property required to construct the project. This task shall include reviewing any exhibits for proposed easements

and acquisition prepared by the design consultant for accuracy and adherence to State and County laws, and all preliminary title reports, referenced deeds and maps, and legal descriptions necessary for property acquisition. Coordination with Caltrans staff will also be required for any acquisition of property that will be under future State jurisdiction. The PM firm shall coordinate with SJCDPW Real Property staff, and may be required to assist the design consultant coordinate field meetings with affected property owners.

It is anticipated that the PM firm may be required to provide coordination for limited design assistance during construction, primarily consisting of field reviews and meetings, as requested by SJCDPW, plus responding to requests for information. Construction management will be provided by SJCDPW or a firm selected by SJCDPW to provide construction management services, and the PM firm will be expected to assist with any coordination necessary between the design consultant and construction management.

#### **TASK 1.5      BIDDING AND POST AWARD ASSISTANCE**

The PM firm shall provide assistance during the advertising and bidding phase of the Roundabout project. Assistance will involve coordinating with the design consultant to provide clarification or answers to questions received from prospective bidders. This assistance could include coordinating necessary design revisions if SJCDPW deems it necessary, including possible approval from Caltrans. SJCDPW shall be responsible for receiving all inquiries and providing all responses to questions received during the bidding period.

It is anticipated that the PM firm may be required to provide coordination for limited design assistance during construction, primarily consisting of field reviews and meetings, as requested by SJCDPW, plus responding to requests for information. Construction management will be provided by SJCDPW or a firm selected by SJCDPW to provide construction management services, and the PM firm will be expected to assist with any coordination necessary between the design consultant and construction management.

Due to the Roundabout project's location within Caltrans ROW, Caltrans staff will be involved with inspection of the work. The PM firm may be required to coordinate between the design consultant, Caltrans, and construction management to help resolve any issues that may arise.

NOTE: The selected PM firm providing the requested staff augmentation project management services will not be allowed to oversee or manage consultant services provided by their firm. Thus, the selected PM Firm will be excluded from consideration for any other consultant services solicited for either or both projects.