



CALIFORNIA

High-Speed Rail Authority

CALIFORNIA HIGH-SPEED RAIL: Request for Qualifications No. HSR24-36 for Property Management Environmental Services

Pre-Bid Conference

December 20, 2024

WELCOME AND AGENDA

- Moderator
 - » Alice Rodriguez, Deputy Director of External Affairs
- Procurement and Contract Overview
 - » Brenda McKenzie, Associate Deputy Director of Real Property, Property Management
- Small Business Program Overview
 - » Chardena Valley, Small Business Advocate
- Organizational Conflicts of Interest Overview
 - » Tawnya Southern, Attorney IV, Authority Legal Office

PROCUREMENT PROCESS DETAILS

- **Property Management Environmental Services Webpage**

» <https://hsr.ca.gov/business-opportunities/procurements/architectural-engineering-and-capital-contracts/property-management-environmental-services-request-for-qualifications/>

Or go to: www.hsr.ca.gov, then [Business Opportunities](#), then, [Architectural & Engineering \(A&E\) and Capital Contracts](#), then [Property Management Environmental Services Request for Qualifications](#)

This webpage will include:

- Pre-Bid Video
- PowerPoint presentations
- Registrant list
- **Submit procurement questions to PMES@hsr.ca.gov**
- **Questions due by Friday, January 3, 2025**



Project Overview

Alice Rodriguez

Deputy Director of External Affairs



Connecting California

Program Highlights

- **Phase 1**
 - 494 Miles
 - San Francisco to Los Angeles/Anaheim
- **Phase 2**
 - After Phase 1 - Extends 300 Miles
 - Connections to Sacramento and San Diego
- **Travels at Approximately 220 mph**
- **Up to 24 Stations**



Where We Are Today

2024 Progress

- **Today:**

- 171 miles under construction or under advance design in the Central Valley
- 463 Miles from downtown San Francisco to downtown Los Angeles is environmentally cleared
- One remaining segment to be environmentally cleared in 2025
- Station Design for four Central Valley Stations is underway





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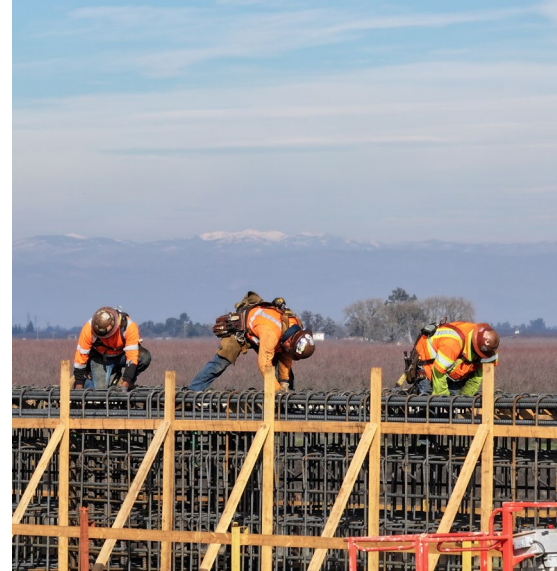
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JOBS AND COUNTING

- **14,000+ Construction Jobs Created Since Construction Began**
 - Average 70% Workers from Disadvantaged Communities
- **880+ Small Businesses Employed**



Central Valley Stations Under Design

Merced



Fresno



Kings Tulare



Bakersfield



Procuring Trainsets



California High-Speed Rail Industry Forum

SAVE THE DATE

January 30-31, 2025

May Lee Complex

651 Bannon St, Sacramento, CA 95811

The California High-Speed Rail Authority (Authority) is hosting an in-person two-day forum to share the latest program progress, share the vision of the next phase of the project and conduct a series of discussions on technical topics related to the advancement of high-speed rail in California. The event will be an opportunity for industry players to engage and network with the Authority and each other as we discuss topics that will streamline delivery, reduce cost, and increase project efficiency of this historic project.





Request for Qualifications No. HSR24-36 for Property Management Environmental Services

Brenda McKenzie

**Associate Deputy Director of Real Property,
Property Management**



Property Management Environmental Services

Scope of Work

- The Authority has issued this Request for Qualifications (RFQ) to receive Statements of Qualifications (SOQs) from qualified firms (Offerors) for Property Management Environmental Services. The Authority seeks to contract with the successful Offeror/Consultant to provide property management compliance services, including management of the Authority's various properties, conducting reviews as to all necessary work, scheduling and coordinating maintenance work, demolition activities or other services, and timely completing, coordinating and scheduling any necessary environmental review activities.
- The inventory of properties includes vacant, improved, and agricultural parcels; occupied and unoccupied buildings and other structures; single-family and multifamily residential properties; commercial and industrial fixtures, structures, buildings and uses (in rural, agricultural, and urban settings); and other types of properties.
- Some properties are wholly or partially located within environmentally impaired, permitted, or sensitive areas.
- The properties are located in the Central Valley, including the counties of Madera, Merced, Fresno, Tulare, Kern, and Kings.

Property Management Environmental Services

Procurement and Key Contract Terms

- This is an A&E qualifications-based procurement.
- Refer to the RFQ for more detail regarding the qualifications, scoring and the evaluation process.
- The term of the contract is two years, with the ability to amend for additional time.
- The total contract value is not to exceed \$3.0 million dollars.
- The fee is 9.5%.
- The contract includes the Authority's current HSR SB Program Plan requirements, which establishes a 25 percent Small Business goal, inclusive of a 3 percent goal for Microbusinesses, and a separate 3 percent Disabled Veteran Business Enterprises goal.
- The Authority will enter into limited negotiations with the top-ranked Offeror.
- Proposed rates and costs will be provided by the top-ranked Offeror after the Notice of Proposed Award.
- A pre-award review will be conducted concurrently with the process to finalize the contract.

Key Personnel and Additional Expertise

- Key Personnel are subject matter experts with the qualifications required for this work for the duration of the contract. The Key Personnel include:
 - Contract Manager
 - Property Management Manager
 - Project Manager
 - Quality Manager
- It is the responsibility of the Contract Manager to track and maintain these Key Personnel positions filled with qualified individuals.
- Additional expertise personnel are subject matter experts who are brought onto the project for task order specific work, including the necessary environmental services related expertise.
- It is the responsibility of the Contract Manager and Property Management Manager to coordinate and fill the additional expertise positions with qualified individuals as needed to meet scheduling, technical, and work requirements.
- Please refer to the RFQ and Draft Agreement for the specific details and requirements for these positions.

Key Procurement Dates

Key Dates	Activity Description
Friday, December 13, 2024	RFQ advertised
Friday, December 20, 2024	Virtual Pre-Bid Conference
Friday, January 3, 2025	Last day to submit written questions
Wednesday, February 12, 2025	SOQs due by 12:00 PM Pacific Time
Wednesday, March 12, 2025	Notice of Proposed Award
April 2025	Notice to Proceed Issued



California High-Speed Rail Industry Update

Small Business Program Overview

Chardena Valley, Small Business Advocate

Process & Program Development Branch

Small Business Program

sbprogram@hsr.ca.gov



Small Business By the Numbers



SMALL BUSINESS PARTICIPATION (as of October 2024)

881 Certified Small Businesses working on the high-speed rail program statewide

305 Certified Disadvantaged Business Enterprises
110 Certified Disabled Veteran Business Enterprises

NORTHERN CALIFORNIA:
320 Certified Small Businesses

CENTRAL VALLEY:
233 Certified Small Businesses

SOUTHERN CALIFORNIA:
297 Certified Small Businesses

OUTSIDE OF CALIFORNIA:
31 Certified Small Businesses

Small Business Participation Goal Breakdown

Blended State and Federal	100% State Funded	100% Federal Funded (including grants)
<p style="text-align: center;">3%</p> <p>Disabled Veteran Business Enterprise (DVBE) goal, which will be applied across the total contract value.</p>	<p style="text-align: center;">3%</p> <p>DVBE goal</p>	<p style="text-align: center;">17%</p> <p>Disadvantaged Business Enterprise (DBE) goal</p>
<p style="text-align: center;">10%</p> <p>DBE goal, which will also be applied across the total contract value.</p>	<p style="text-align: center;">25%</p> <p>Small Business goal using all categories that qualify under the state standard, which includes certified Small Business and SB-PW.</p> <ul style="list-style-type: none"> Of that 25% we will designate 3% microbusiness 	
<p style="text-align: center;">25%</p> <p>Small Business goal using all categories that qualify under the state standard, which includes certified Small Business and SB-PW.</p> <ul style="list-style-type: none"> Of that 25% we will designate 3% microbusiness 		

Small Business Goal Requirements for the Property Management Environmental Services Contract

- This RFQ and contract incorporate the Authority's HSR SB Program Plan, dated November 2, 2023, which establishes a 25 percent Small Business goal, inclusive of a 3 percent goal for Microbusinesses. It also requires a separate 3 percent Disabled Veteran Business Enterprises goal.
- For this contract, which is 100% state funded by state dollars, the current anticipated total contract value is \$3,000,000. Of that amount, the total Small Business value is \$750,000 inclusive of the Microbusiness carveout value of \$22,500. The Disabled Veteran Business Enterprises value is \$90,000.

Commitment to Diversify

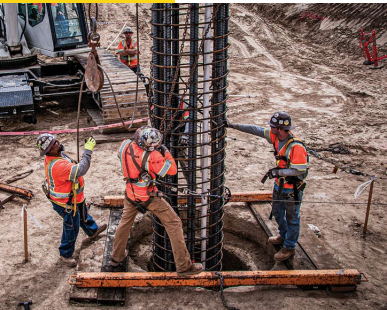
Small Business Certification Overview

Certifications That Count Toward the Overall Goal:

- **California Department of General Services**
 - Small & Micro Businesses (SB / MB)
 - Disabled Veteran Business Enterprises (DVBE)
 - Small Business for Public Works (SB-PW)

state
- **California Unified Certification Program**
 - Disadvantaged Business Enterprises (DBE)

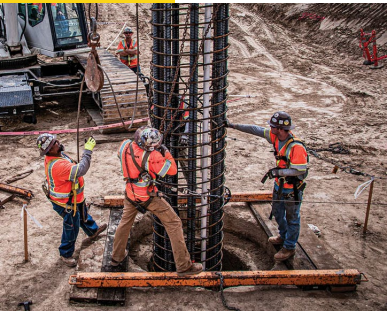
federal



Small Business Teams

Exclusivity

- » There is no prohibition against Subconsultants/Subcontractors being exclusive to one Offeror, however, exclusivity is strongly discouraged for SB/DBE/DVBE Subconsultants/Subcontractors



Connect HSR

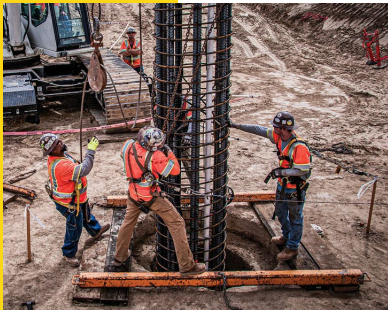
High-Speed Rail Vendor Registry



Free Online Tool to Connect with Business Opportunities

Open to All Businesses, Large & Small

- **List Your Business:**
 - Type of Business
 - Services Offered or Supplies Sold
 - Service Counties
 - Certifications
- **Learn About:**
 - Future Contracting Opportunities
 - Trainings/Workshops
- **Register At:**
 - www.connecthsr.com





CALIFORNIA
High-Speed Rail Authority

SB Workshop Registration





CALIFORNIA HIGH-SPEED RAIL AUTHORITY

Organizational Conflicts of Interest Overview

Tawnya Southern
Attorney IV, Authority Legal Office



ORGANIZATIONAL CONFLICTS OF INTEREST

- All entities desiring to enter into an Authority contract must comply with its Organizational Conflict of Interest (OCOI) Policy (Policy).
- Why is the OCOI Policy necessary?
 - » Our federal grants require it;
 - » Ensures a fair and transparent procurement process, maximizing competition and minimizing exposure to bid protests; and
 - » Ensures compliance with state and federal procurement laws and regulations.
- The OCOI Policy was originally adopted in 2011 and was last updated in 2023.

OCOI POLICY DEFINITION

An “Organizational Conflict of Interest” is defined in the OCOI Policy as:

“...a circumstance arising out of a Contractor’s existing or past activities, business or financial interests, familial relationships, contractual relationships, and/or organizational structure (i.e., parent entities, subsidiaries, Affiliates, etc.) that results or would result in:

- **impairment or potential impairment of a Contractor’s ability to render impartial assistance or advice to the Authority or of its objectivity in performing work for Authority,**
- **an unfair competitive advantage for any Contractor bidding or proposing on an Authority procurement, or**
- a perception or appearance of impropriety with respect to any of the Authority’s procurements or contracts or a perception or appearance of unfair competitive advantage with respect to a procurement by the Authority (regardless of whether any such perception is accurate).”

ORGANIZATIONAL CONFLICTS OF INTEREST

- **Two general situations in which an organizational conflict of interest will be found to exist for a contractor:**
 - » **1. A contractor has an unfair competitive advantage**
 - *Example: A contractor has inside or non-public information about a procurement*
 - *Example: A contractor provides services related to a procurement and then bids on it*
 - » **2. A contractor's objectivity in performing its contractual obligations for the Authority would be compromised such that it could not provide impartial assistance**
 - *Example: A contractor on Contract A is in a position to oversee its own work on Contract B and mitigation is not possible*

OCOI POLICY FLEXIBILITY

- A common misperception is that Contractors are generally “conflicted” out simply because of current or prior work on the Project.
- While some conflicts cannot be mitigated, the vast majority of OCOI determinations find that a contractor may participate in the desired procurement and resulting contract.
- The Policy states that “the Authority recognizes that its goals must be balanced against the need to not unnecessarily restrict the pool of potential proposers or bidders available to participate in Authority procurements and contracts.”
- If a potential conflict is recognized, the Policy requires consideration of numerous factors to determine whether the contractor may participate in the contract and whether mitigation or safeguards may be implemented to permit participation.
- Such safeguards are commonly applied to allow participation and include measures like ethical walls and release of work product.

OCOI REVIEW PROCESS

- Interested Contractors should review Section 3.7 of the RFQ and the Authority's Organizational Conflict of Interest Policy: <https://hsr.ca.gov/business-opportunities/general-info/organizational-conflict-of-interest-policy/>
- If the interested Contractor has any concerns that it may have an actual or perceived OCOI, it should request a determination from the Authority (instructions on next slide).
- Advanced or pre-clearance is not necessary if there are no concerns regarding an actual or perceived OCOI.
 - » *Example: A Contractor has never worked on the high-speed rail project nor a related project and has no financial affiliations with Authority Contractors*
- In conjunction with its participation in the SOQ submission, all interested Contractors will submit Form C: Organizational Conflicts of Interest Disclosure Statement in which it will either disclose potential OCOIs or indicate that it has none to disclose.
 - » *Current HSR contracts should be disclosed on this form*

HOW TO REQUEST AN OCOI DETERMINATION

- Requests for Organizational Conflict of Interest determinations should be submitted to the Authority's Chief Counsel, Alicia Fowler, at Legal@hsr.ca.gov, referencing the RFQ No. HSR24-36.
 - When submitting the determination request, please provide a response to the information requested in the Organizational Conflict of Interest Checklist, items 1-8, in RFQ Section 3.7.
- The Authority's OCOI determination process includes the following steps:
 - After the request is received, an investigation and analysis, including potential mitigation options, is performed by the attorneys.
 - The requestor will often be asked for additional information and/or documents necessary for the OCOI determination.
 - The Chief Counsel makes the final determination and informs the requestor by letter, which discusses the relevant facts and applicable OCOI Policy provisions.
 - A requestor who does not agree with an OCOI determination may contact the Chief Counsel to raise additional relevant facts and information.

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