

South Bay Cities Council of Governments

December 14, 2015

TO: SBCCOG Steering Committee

FROM: Jacki Bacharach, SBCCOG Executive Director
Steve Lantz, SBCCOG Transportation Director

SUBJECT: Task Order(s) to provide SBHP Project Management Courses

Adherence to Strategic Plan:

Goal A: Environment, Transportation, and Economic Development. Facilitate, implement and/or educate members and others about environmental, transportation, and economic development programs that benefit the South Bay.

Background

In fall 2012, SBCCOG offered a five-session, 20-hour course in project management to South Bay public works and traffic engineering staff. The course was developed and presented by Gary Griggs, a senior vice president with Parsons Brinckerhoff who is also a consulting professor at Stanford University. The SBCCOG administrative staff provided support for course marketing and logistics under the SBCCOG's current funding agreement with Metro as an element of the SBCCOG's responsibilities for program development, implementation oversight and project risk management. More than 36 SBCCOG members' staff registered for the course and committed to pay the \$100 registration fee. The class was rated highly by participants.

This year during our workshops on Measure R, requests were received for 3 types of courses.

1. South Bay agencies have requested that the SBCCOG again offer an introductory program management course.
2. SBCCOG board members have expressed interest in a South Bay Highway Program (SBHP) Orientation Workshop that focuses on the information needed for effective Board/Council policy oversight for public works projects.
3. Interest has been expressed for a more advanced project management course to develop skills and knowledge useful in becoming certified as a Professional Management Professional (PMP) by the Project Management Institute (PMI).

Introductory Project Management & Orientation for Board

SBCCOG staff would like to solicit qualified firms from the SBCCOG SBHP Technical Services Bench, using the Board-approved task order process, to produce the introductory program management course for agency staff and the orientation workshop for elected officials. The SBCCOG would like the course and workshop to be completed by fall 2016. Conceptual topics are summarized in Exhibit A. Staff recommends that a \$100 registration fee be charged for the course and that the workshop for elected officials be offered at no cost to participants.

The task order request scope of work would include development of the curriculum, creation and distribution of materials, presentation of the class and workshop, and management of a post-course evaluation by participants. The task order for the 2012 project management course was

for \$26,810. It is not known whether a single bench consultant will be selected for the course and the workshop within one task order, or whether two task orders will be needed. The exact cost of the 2016 task order(s) cannot be estimated until the task order(s) is (are) negotiated.

Staff will return to the Board once task order negotiations are completed.

Professional Management Professional

SBCCOG staff has completed an initial scan of advanced project management courses leading to PMP certification by PMI. PMP certification requires several years of professional project management experience, completion of 35 hours of training in project management, and passing a 4-hour multiple choice PMP certification exam. The preparation courses are currently offered in continuing education programs at local universities and by private vendors. These 35-hour certificate programs typically cost \$1,500 to \$2,000. The exam costs approximately \$500.

Because of the time commitment and cost, instead of creating a SBCCOG-specific advanced project management course, SBCCOG staff does not recommend providing this course to cities.

RECOMMENDATION

SBCCOG staff recommends that the SBCCOG Steering Committee authorize the SBCCOG Executive Director to issue a task order soliciting proposals from qualified firms on the SBHP Technical Services Bench for an introductory SBHP project management course and an SBHP Orientation Workshop for elected officials consistent with topics as described in Exhibit A.

Additionally, SBCCOG staff recommends that the Infrastructure Working Group discuss the potential for the SBCCOG to work with a current PMP course provider to co-sponsor a course customized specifically to the SBHP program and its projects and seek to obtain a discount for SBCCOG Measure R agency participation.

Exhibit A - Conceptual Topics for SBCCOG SBHP Project Management Course and SBHP Elected Officials Workshop

1. SBHP Project Management (4 three-hour sessions)

Session I SBHP Project Overview Topics

- a. Review background on roles and responsibilities for project selection, funding, development and project delivery within the Metro Measure R South Bay Highway Program.
- b. Review applicable SBHP policies and procedures used by lead agencies for managing a SBHP project through the SBHP program phases: project development, project definition/ environmental review / funding, design, right-of-way acquisition, construction, and project performance evaluation.

Session II SBHP Project Delivery

- a. Review the different lead agency options for project development and delivery including staff management, design-bid-build, design / build, CM/GC, CM-at-Risk and Public-Private Partnerships.
- b. Review public agency contract packaging approaches, different organizational strategies and sample project management plans.
- c. Review options for managing development and delivery of multi-jurisdictional projects (with adjacent local jurisdictions, Caltrans, Metro).

Session III SBHP Project Procurement Topics

- a. Review the different approaches to public agency contract procurement including use of SBHP Technical Services Bench, key provisions of professional services and construction contracts including compensation, liability, insurance, change orders, claims, and dispute provisions.
- b. Review applicable Federal, State, Metro, and local procurement requirements and regulations. Quality-based, low bid, price-and-other-factors, best-value, and negotiated procurement options will be reviewed.

Session IV SBHP Project Risk Management / Quality Control Topics

- a. Review the various methods of controlling quality, cost and schedule including earned-value and forecast-at-completion approaches and different management information reporting systems.
- b. Review risk management procedures including categorical, probabilistic and parametric approaches.
- c. Review dispute resolution approaches including informal, mediation, arbitration and litigation.

2. SBHP Orientation Workshop for Elected Officials

Background

- SBHP Overview - History / Administrative Structure / Roles and responsibilities
- SBHP Funding – Sources / Program and project funding / Cost sharing
- SBHP Project eligibility and selection
- SBHP Project Development and Delivery Process
- SBHP Project management / procurement options
- SBHP Project progress monitoring and reporting requirements
- SBHP Project administration of changes in scope, schedule and budget
- SBHP Project signage / events / media relations
- Annual SBHP Metro Budget Request Process

Concerns for the Future

- SBHP Measure R funding capacity
- Non-SBHP transportation funding projections / local and sub-regional needs
- Metro Long Range Transportation Plan – Neighborhoods Up Strategy
- Failed Measure J / Potential November 2016 sales tax measure
- Restructuring the Metro Call for Projects