



**VTA BSVII Executive Monthly Progress Report**  
November 1, 2024 – November 30, 2024

Revision 0  
December 29, 2024

*Issued for January 16, 2025 VTA's BSVII Oversight Committee Meeting*

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APPENDIX A – MAJOR CONTRACTS SUBCONSULTANTS LIST

# 1 VTA BSVII EXECUTIVE SUMMARY

Note: The monthly report reflects Budget terminology based on current BSVII plans and procedures. Until FFGA is executed, the term "budget" in this report is synonymous with "estimate". For reporting purposes, Table 7 and Figure 3 have been revised to reflect the "estimate" terminology.

## 1.1 BSVII HIGHLIGHTS

- 1. Configuration Updates:** VTA continues to review proposed optimizations and cost saving candidates (CSCs) to achieve cost reductions. Certain optimizations / CSCs were approved for implementation while others are in the assessment phase. Evaluation of these optimizations / CSCs will result in configuration changes to the current program scope.
- 2. FTA Coordination:** The project team continues to actively work to align the project cost to the available funding in addition to pursuing additional funding sources. Efforts on cost saving measures continue. FFGA execution and associated milestones have been revised based on the forecasted plan and summarized in Section 2. VTA and FTA continue to coordinate regarding the timing of FFGA execution. *Update as of December 20, 2024: VTA hosted FTA-PMOC at the BSVII Project Office for a workshop to discuss VTA's progress on various cost saving ideas and to brainstorm FTA-PMOC's potential cost saving ideas.*
- 3. Contract Package 2:** VTA and KST completed negotiations for Amendments 6, 7 and 8 covering revised contractual terms, EWP 3B, and EWP 3C.2 (West Portal Launch Structure), respectively. VTA Board approved EWP 3B in November 2024 and VTA executed amendment #7 related to the same item in November 2024. VTA Board action on EWP 3C approval is expected on December 5, 2024. *Update as of December 20, 2024: VTA Board approved EWP 3C during the December 5, 2024, meeting. VTA issued a letter to restart EWP 3C.1 work and to provide a limited NTP to KST to begin work on ramp assessment and design optimizations.*
- 4. Schedule Updates:** Based on the final EWP 3C negotiations, the NTP for EWP 3C heavy construction moved from January 2025 to February 2025. In addition, the schedule duration for EWP 3C increased. Following the planned February 2025 NTP for the EWP 3C heavy construction, the project team will work with the contractor to identify opportunities to accelerate construction activities wherever possible. VTA also included incentive clauses and liquidated damages clauses in Amendment #8. Based on the final terms of Amendment #8, approximately four months of schedule contingency was consumed. Refer to Sections 2.3 and 2.4 for additional details. To mitigate the contingency use and currently projected delays for future work, VTA has set up a task force to evaluate CP2 contract options, including evaluating other potential contract packaging solutions to expedite the schedule and minimize projected delays.
- 5. Budget Updates:** Budget Contingency Drawdown: Based on the negotiated values of EWP 3B (executed in November) and EWP 3C, a total of \$259M was drawn down from a combination of allocated and unallocated contingencies. Refer to Section 3.2 for more details related to schedule contingency drawdown.
- 6. Funding Updates:** VTA submitted two grant applications (Solutions for Congested Corridor, Local Partnership Program) and coordinated with the sponsors. VTA continues to pursue other potential funding sources. *(No Major changes from last month's updates).*
- 7. Program Management Services Procurement:** Procurement is underway. *(No Major changes from last month's updates)*
- 8. Management Capacity:** Chris Ralston is being onboarded as the new Quality Manager. VTA is coordinating and planning for onboarding additional Construction Management personnel for managing EWP 3C work.
- 9. Risks:** During this reporting period, no existing risks were retired, no new risks were added, and the risk level of one item reduced.
- 10. Right of Way (ROW):** Right of Way work continues to progress. Refer to Section 6.2 for more information. *(No Major changes from last month's updates).*

11. **Third Party / Utilities / Agency Coordination:** Work continues to progress. *(No major changes from last month's updates)*. Refer to Section 6.3 for Utilities summary and 6.4 for Third Parties summary.
12. **Other key CP2 updates:**
  - a. Except for Advance Partial Design Units, Basis of Design Report and D10 – Bored Tunnel Design, all other design units design progression has been paused to evaluate proposed optimizations and cost saving candidates.
  - b. BSVII Management team continued to collaborate with the CP2 Contractor (KST) on various activities including optimizations, early works package (EWP) reviews, relief requests, change orders, submittals, payment requests, RFIs, etc.
  - c. EWP 1A (TBM Procurement): Design work related to certain components, construction planning, TSCD's and fabrication support are in progress.
  - d. EWP 3A (West Portal (WP) Site Preparation): Work continues to progress. KST completed work activities that include installation of storm drain, sanitary sewer, and industrial water systems; trenching, pipe placement, backfill and tie-in work. Three steel underground storage tanks received County/SJFD permits, were cleaned and removed from the trench excavation.
  - e. EWP 7A (Instrumentation and Monitoring at WP tracks) –90-day baseline data collection is completed and KST is developing the I&M monitoring plan submittal.
  - f. EWP 11A/11B (West Portal TBM and Plant Power) – KST started technical clarifications for Low/Medium voltage panels, devices, switchgear and HVSS Transformer equipment and anticipates fabrication and delivery schedules in the upcoming month.
13. **CP1, CP3, CP4 and Outreach updates:** Design and technical specifications for Systems, Stations, and Yard facilities are progressing with the current General Engineering Consultant (GEC) team. VTA continues to engage other key stakeholders.
  - a. Design resources have pivoted to evaluating optimization and cost savings candidates' proposals. VTA is reviewing the program designs to identify cost saving candidates and evaluating their feasibility along with establishing ROM values for potential cost reductions. The current focus remains on further progression of optimizations and cost savings.
  - b. VTA continues to conduct technical working group meetings with BART stakeholders relating to the proposed request for variances (RFVs).
  - c. VTA continues to present updated information on the stations cost saving candidates at the VTA Board workshop on November 8, 2024, and to the station community working groups (CWG) on November 12, 13 and 14, 2024. CWG members confirmed their acceptance of the proposed configuration changes.
  - d. The Safety / Security team continues to support costs saving activities by performing risk assessments for recommendations that potentially impact safety or security certifiable items. One revised risk analysis was presented at the November 2024 SSRC meeting related to a revised design for the sump pumps in the tunnel. This risk assessment was approved, with minor changes recommended by BART. The approval was documented by a Record of Decision (ROD) for the alternative design of the sump pump. VTA continues to track other measures that potentially have safety or security impacts.



## 1.2 KEY ISSUES

Table 1 outlines Key Open Issues and actions as of this reporting period.

**Table 1 – Key Open Issues and Actions**

Issue Description	Actions
West Portal TBM launch structure (EWP 3C) NTP is impacting the critical path.	<p>VTA is planning to bring forth a Board action request in December 2024 for approval. The pending NTP of EWP 3C is impacting the critical path.</p> <p><i>Update as of December 20, 2024 – VTA Board approved EWP 3C. VTA issued a LNTP to initiate design optimizations and ramp assessment. This issue will remain open until VTA issues full NTP in February 2025.</i></p>
Observed misalignment between KST and VTA on the Progressive Design Build delivery approach from different points of reference.	<p>VTA and KST are collaboratively working to minimize the impacts of this issue. A multi-session partnering effort began in March 2024 and continues monthly with representatives from both parties to address and mitigate issues. Discussions to date indicate that scope shifts between contract packages may be required. VTA is continuing to develop potential full and partial off-ramp scenarios which include evaluation of contract scope shifts.</p> <p>In addition, staff established a BSVII Contracting Task Force to evaluate various approaches for contract delivery including partial and full off-ramp, re-packaging of construction contracts, and development of an industry sounding strategy. This task force includes representation from VTA's General Counsel's Office, VTA's Procurement Department, BSVII Project Staff, and the VTA's BSVII Oversight Committee Subject Matter Expert Gall Zeidler.</p>
FTA NSEE acceptance resulted in a maximum federal contribution of \$5.1B, resulting in funding shortfall.	VTA is working on various cost saving candidates to reduce the project costs while also working to identify other non-local funding sources.
Current forecast for FFGA execution	FFGA execution and associated milestones have been revised based on the forecasted plan and summarized in Section 2. Primary impact for the current forecasted FFGA target is the CP2 Stage 2 NTP date. VTA is assessing the availability of local funding based on the current FFGA target to support ongoing project activities.
Potential further design changes of the underground stations (Diridon, Downtown and 28 <sup>th</sup> Street/Little Portugal) due to stakeholder, community and Board referral feedback	VTA Board issued a referral directing stakeholder requested changes to be incorporated into the station design. VTA presented the progress to the CWGs and the Board and is in the process of incorporating the feedback.

Issue Description	Actions
FTA-PMOC indicated areas of concern, including: <ul style="list-style-type: none"> <li>i. CP2 Early Work packages update</li> <li>ii. Delay in UPRR Cost Reimbursement Agreement execution</li> </ul>	VTA is working to address FTA-PMOC concerns: <ul style="list-style-type: none"> <li>i. EWP 3 negotiations are complete and will be submitted for board action on December 5, 2024. Cost and schedule impacts are identified in Section 1.1.</li> <li>ii. A meeting between VTA and UPRR top executives will be scheduled in 2025 for resolution.</li> </ul>

Table 2 outlines the issues closed during this reporting period.

**Table 2 – Closed Issues and Actions**

Issue Description	Actions
None to report this period	

### 1.3 KEY DECISIONS

Table 3 outlines the key open decisions as of this reporting period.

**Table 3 – Key Open Decisions**

Description	Notes
Evaluation and Approval of Optimizations/Cost saving candidates (CSCs)	VTA continues to review proposed optimizations/ CSCs to achieve cost reductions. Certain optimizations/CSCs were approved for further evaluation while others are in the assessment phase. Evaluation of these optimizations/CSCs will result in configuration changes to the current program scope.
EWP 3C Optimizations	VTA and KST are further evaluating design alternatives (against the current AFC documents) for design optimizations of the ramp, and the back wall of the caterpillar shaft as it pertains to deleting the ramp. KST is expected to complete the proposal in January 2025 and VTA is expected to make the decision on path forward in February 2025.
CP2 Tunneling Work Package Proposal	VTA continues discussions with KST; the proposal has not been accepted. Decision on the path forward is in progress.

Table 4 outlines the decisions that were closed during this reporting period.



**Table 4 – Key Closed Decisions**

Description	Notes
None to report this period	

## 1.4 BSVII OVERVIEW / SUMMARY

VTA's BART Silicon Valley Phase II (BSVII or Program) is an approximately six-mile extension of BART service from the Berryessa/North San José Station through Downtown San José and terminating near the Santa Clara Caltrain Station. BSVII is planned to include three below-ground stations (28th Street/Little Portugal Station, Downtown San José Station, and Diridon Station) and one at-grade station (Santa Clara Station), and a maintenance facility at Newhall Yard.

VTA and BART are active partners in the decision-making process for BSVII. The division of responsibilities between VTA and BART with respect to BSVII is governed by the VTA/BART Comprehensive Agreement executed on November 19, 2001.

BSVII will be implemented within, and serve, the City of San José, the City of Santa Clara, and the County of Santa Clara. The Program requires public works coordination, work in city ROW, traffic control, environmental compliance, and various other points of interface.

In February 2018, FTA and VTA issued the Final SEIS/SEIR. On April 5, 2018, VTA's Board of Directors certified the Final SEIR and approved BSVII. On April 26, 2018, the BART Board of Directors accepted the SEIR and, pursuant to the Cooperative Agreement, approved BSVII. FTA issued a ROD on BSVII on June 4, 2018.

VTA's Consultant Team provides program management, engineering services and engineering support to VTA and is comprised of a Program Management Team (PMT) and a General Engineering Consultant (GEC). Currently, both the contracts are active. VTA concluded the negotiations of the Construction Management Services Procurement that, after Board approval and VTA contract award, will become part of VTA's Consultant Team. VTA's Consultant Team will support VTA through annual work programs that set the level of support and responsibilities based on Program development requirements for each contract. Summary scope of services is outlined in Section 6.

BSVII comprises of four major construction contract packages (CPs) that are being planned with different delivery methods. CP1 (Systems), CP3 (Newhall Yard and Santa Clara Station), CP4 (Underground Stations) are currently being in Design by the GEC. Construction delivery will be through Design-Bid-Build delivery method. CP2 (Tunnel and Trackwork) is also currently in design phase and being designed by KST. CP2 is being delivered through Progressive Design Build delivery method.

In June 2022, Kiewit Shea Traylor – A Joint Venture (KST) was selected as PDB contractor for CP2 and initiated design services. KST scope includes design and construction of a single bore tunnel with side-by-side trackways, internal concrete structures, portals, adits, support of excavation for underground stations, trackwork, procurement of a tunnel boring machine, demolition, utility relocations and other enabling works. CP2 contract interfaces with the three underground station facilities along the alignment and the CP2 contractor will be responsible for constructing the support of excavation and any required adits connecting the underground stations with the tunnel.

BSVII is a federally funded project in conjunction with the Federal Transit Administration (FTA). VTA initially entered New Starts Project Development with FTA in 2016. As of 2018, VTA advanced the BSVII project under FTA's Expedited Project Delivery (EPD) Pilot Program. The project was conditionally approved for an EPD grant and FTA issued a Letter of Intent (LOI) on September 21, 2021, that granted pre-award authority to incur costs for engineering activities, utility relocation, real estate acquisition, and construction. In mid-2022, VTA began exploring alternative funding strategies, including re-entering the New Starts Program. On

October 18, 2022, through letters to the FTA Associate Administrator for Planning and Environment and Region IX Administrator, respectively, VTA simultaneously requested re-entry into New Starts Project Development (NSPD) and a Letter of No Prejudice (LONP) that would preserve elements of the pre-award authority for project activities provided for by the EPD LOI. FTA approved both requests on December 1, 2022.

As part of the re-entry to the New Starts Program, updated preliminary baseline data (scope, cost, schedule and risk) was developed that incorporated the CP2 Innovations, CP2 Contractor Stage 1 Baseline schedule, and the updated design-bid-build (DBB) contract packaging approach for CP1, CP3 and CP4. This BSVII preliminary baseline schedule (data date of August 1, 2023) was submitted to FTA to support the FTA risk workshop. FTA, PMOC, and the BSV team, comprised of VTA, BART, PMT and GEC staff, participated in this three-day Risk Workshop on January 16-18, 2024.

VTA developed the new baseline schedule with a target Revenue Service Date (RSD) of Q2-2037. The risk assessment by FTA indicated a projected RSD of February 2039, inclusive of FTA-assessed schedule contingency. To support the ongoing application for New Starts CIG federal funding, VTA adopted the FTA-recommended schedule contingency that indicates a Q1-2039 RSD while managing to the aforementioned target RSD of Q2-2037.

Based on the risk assessment shared by the FTA/PMOC, FTA/PMOC proposed a total cost increase (excluding financing cost) of \$599M (approx.) of which \$524M (approx.) was attributed primarily to FTA's recommendation of a higher escalation rate for the remaining duration of the Project. VTA adopted this recommendation. VTA developed an updated financial plan for the NSEE application resulting in a slight reduction in finance charges. Overall, the update resulted in a net program budget increase of \$509M. The new FTA eligible baseline budget totals \$12,746M.

On August 1, 2024, FTA informed VTA of the approval of BSVII to enter the New Starts Engineering (NSE) phase as part of the Capital Improvement Grant (CIG) program. The approval to NSE phase also indicated a \$5.1B Federal share to the Project post Full Funding Grant Agreement (FFGA). The \$5.1B federal share is a significant contribution and demonstrates FTA's belief in this project and is ready to take the next step. Project team is actively working to bridging the funding gap between the Project budget and currently forecasted available sources. FFGA execution and associated milestones have been revised based on the forecasted plan and summarized in Section 2. VTA and FTA continue to coordinate regarding the timing of FFGA execution. VTA is assessing the impact on local funding requirements based on the current FFGA target.

## 2 SCHEDULE SUMMARY

Effective in the February 2024 reporting period, BSVII adopted the Baseline Schedule. This baseline schedule (data date of March 1, 2024) was submitted to FTA as part of VTA's application to enter the New Starts Engineering Phase in March 2024. VTA completed the November 2024 schedule update (data date of December 1, 2024) and the summary can be found in Sections 2.1, 2.2 and 2.3.

- a. Section 2.1 summarizes the overall Program schedule.
- b. Section 2.2 depicts the key milestones for the program.
- c. Section 2.3 outlines the changes to the November 2024 schedule update in comparison to the October 2024 schedule update and the baseline schedule.
- d. Section 2.4 outline the schedule contingency drawdown status as of this reporting period.

## 2.1 BSVII SUMMARY SCHEDULE

Figure 1 provides the summary schedule of the overall program.

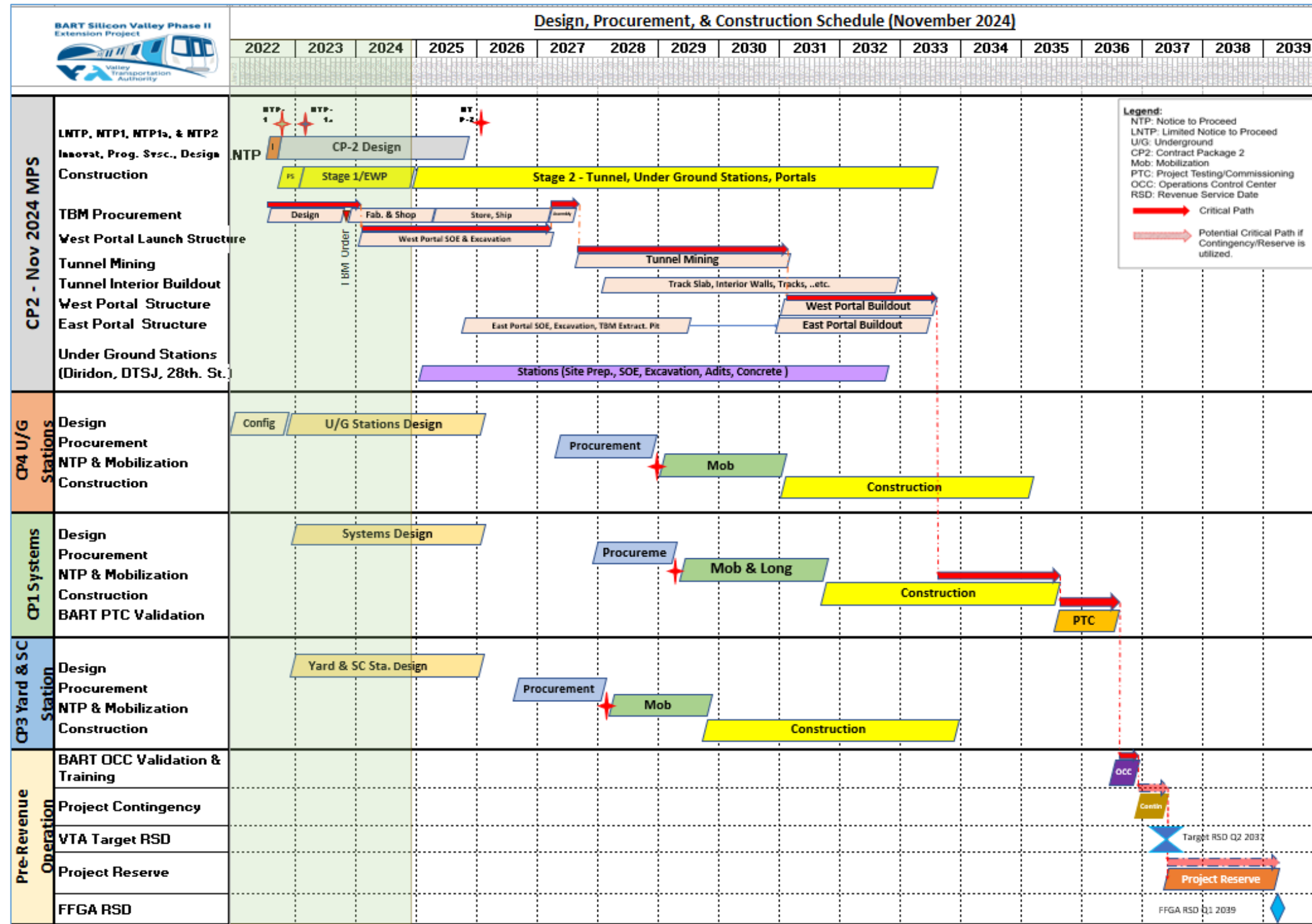


Figure 1 – Program Summary Schedule

## 2.2 MILESTONE SUMMARY

Table 5 provides the key milestone dates based on the November 2024 schedule update in comparison to the baseline schedule and prior month update. High level summary narrative is provided in Section 2.3. To mitigate the contingency usage and delays occurred to date for future work, VTA has set up a task force to evaluate CP2 contract options including evaluating other potential contract packaging solutions to expedite schedule and reduce delays. A comprehensive risk assessment will be conducted after those options have been evaluated and a path forward determined.

**Table 5 – Milestone Summary**

<b>Milestone Name (Bolded Underlined Dates = Actuals Red text = Changes from past month)</b>	<b>Current Baseline (Per NSEE application)</b>	<b>Past Month Forecast (October 2024)</b>	<b>Current Month Forecast (November 2024)</b>
<b>Programwide</b>			
BSVII Project start (FTA's NSPD approval)	<u>Q1 2016</u>	<u>Q1 2016</u>	<u>Q1 2016</u>
VTA Board approval of BSVII	<u>Q2 2018</u>	<u>Q2 2018</u>	<u>Q2 2018</u>
BART Board approval of BSVII	<u>Q2 2018</u>	<u>Q2 2018</u>	<u>Q2 2018</u>
FTA Issued ROD	<u>Q2 2018</u>	<u>Q2 2018</u>	<u>Q2 2018</u>
Submit EPD grant request	<u>Q2 2021</u>	<u>Q2 2021</u>	<u>Q2 2021</u>
VTA received EPD LOI	<u>Q4 2021</u>	<u>Q4 2021</u>	<u>Q4 2021</u>
VTA request to leave EPD, Enter NSPD	<u>Q4 2022</u>	<u>Q4 2022</u>	<u>Q4 2022</u>
FTA Issuance of LONP to NSPD	<u>Q4 2022</u>	<u>Q4 2022</u>	<u>Q4 2022</u>
VTA Request to enter NSEE	<u>Q1 2024</u>	<u>Q1 2024</u>	<u>Q1 2024</u>
FTA Issue Entry into NSEE	Q2 2024	<u>Q3 2024</u>	<u>Q3 2024</u>
VTA Request to Execute FFGA	Q3 2024	Q3 2025	Q3 2025
FFGA Execution	Q4 2024	Q4 2025	Q4 2025
Start of BART OCC Validation	Q4 2035	Q2 2036	<b>Q3 2036*</b>
VTA Target Revenue Service Date	Q2 2037	Q2 2037	Q2 2037
FFGA Revenue Service Date	Q1 2039	Q1 2039	Q1 2039
<b>CP2 - Tunnel and Trackwork</b>			
CP2 LNTP	<u>Q2 2022</u>	<u>Q2 2022</u>	<u>Q2 2022</u>
CP2 NTP1	<u>Q3 2022</u>	<u>Q3 2022</u>	<u>Q3 2022</u>
CP2 NTP1A	<u>Q1 2023</u>	<u>Q1 2023</u>	<u>Q1 2023</u>
CP2 Tunnel Work Package NTP	N/A	Q1 2025	<b>Q1 2026*</b>
CP2 NTP2	Q4 2024	Q1 2026	Q1 2026*
<b>CP1 – Systems</b>			
CP1 RFP Issue	Q1 2028	Q1 2028	Q1 2028
CP1 NTP	Q2 2029	Q2 2029	Q2 2029
<b>CP3 - Newhall Yard and Santa Clara Station</b>			
CP3 RFP Issue	Q1 2027	Q1 2027	Q1 2027
CP3 NTP	Q1 2028	Q1 2028	Q1 2028
<b>CP4 - Underground Stations</b>			
CP4 RFP Issue	Q4 2027	Q4 2027	Q4 2027
CP4 NTP	Q4 2028	Q4 2028	Q4 2028

\*Subject to change based on ongoing assessments

## 2.3 SUMMARY NARRATIVE

Table 6 provides the summary narrative based on the November 2024 monthly schedule update.

**Table 6 – November 2024 Monthly Schedule Update Summary**

<b>Summary</b>
The baseline schedule has been updated to reflect progress through November 2024. The November 2024 progress schedule has a data date of December 1, 2024. The target Revenue Service Date (RSD) and FFGA RSD did not change this month.
<b>Major changes to the schedule</b>
<ol style="list-style-type: none"> <li>1. Right of Way: Updates to various ROW activities. Effective Possession dates caused slippage in the schedule. The changes in ROW dates did not affect the critical path.</li> <li>2. Utilities: Updates to various utility owners' activities dates caused slippage in the schedule but did not impact the critical path.</li> <li>3. CP2 Construction: The substantial completion of heavy construction at the West Portal launch structure EWP 3C slipped from October 2026 to March 2027. The extended construction duration affected the critical path and caused a total of four months of delays. The BSVII program will utilize approximately one month allocated contingency from the TBM assembly activity and four (4) months of Schedule Contingency activity. As a result, the TBM storage duration is longer than previously anticipated.</li> <li>4. CP2 Construction: The TBM launch date/start of tunnel mining moved from Q2 2027 to Q3 2027 due to change in EWP 3C substantial completion.</li> <li>5. CP2 Tunnel Work Package NTP moved from Q1 2025 to Q1 2026.</li> </ol>
<b>Critical path summary</b>
The change in the start of construction extended the critical path by five months. There were no changes to the activities that comprise the critical path. The following items are on critical path as of this update: <ol style="list-style-type: none"> <li>1. West Portal: Enabling work and Launch Structure (CP2)</li> <li>2. TBM Assembly and testing on site (CP2)</li> <li>3. Tunnel mining from West Portal to East Portal (CP2)</li> <li>4. West Portal: Final concrete work and finishes (CP2)</li> <li>5. West Portal: Train Control Building (CP2)</li> <li>6. Newhall Yard: Systems installation (CP1)</li> <li>7. Phase 2 testing by CP1 Contractor with BART oversight</li> <li>8. BART OCC Validation / Testing</li> </ol>
<b>Schedule Contingency drawdown</b>
CP2 Construction: The substantial completion of heavy construction at the West Portal launch structure part of EWP 3C slipped from October 2026 to March 2027. One month allocated contingency drawdown of TBM assembly task and four months drawdown occurred from Project Contingency activity. Related future milestones such as TBM assembly and "start of tunneling" are forecasted to be delayed, but the Revenue Service Date is not impacted. The Project Reserve activity duration was not impacted. This will reduce the combined total of Project Contingency and Project Reserve from 31.9 months to 27.7 months (with approximately 6.2 months left in the Project Contingency activity). VTA has been tracking a specific risk (#BSV-218 – Potential for delayed start of EWP 3C) in the Program Risk Register.
<b>Major milestones missed this period</b>
None to report
<b>Major events forecasted for next reporting period</b>
Ongoing Early Works Construction at Newhall Yard (West Portal). EWP 3C package prepared for December 2024 VTA Board action.



## 2.4 SCHEDULE CONTINGENCY DRAWDOWN

As of previous reporting period (October 2024), a total of 4.5 months of schedule contingency was drawn down to accommodate delays in the award and NTP of West Portal launch structure early works scope to the CP2 contractor. During the current reporting period, one month of embedded contingency in TBM assembly was drawn down and additional 4 months of schedule contingency (from the Project Contingency) was drawn down resulting in remaining schedule contingency of 27.7 months.

Following the planned February 2025 NTP for the EWP 3C heavy construction, the project team will work with the contractor to identify opportunities to accelerate construction activities and minimize the actual use of contingency wherever possible. VTA also included incentive clauses and liquidated damages clauses in Amendment #8.

To mitigate the contingency usage and delays occurred to date for future work, VTA has set up a task force to evaluate CP2 contract options including evaluating other potential contract packaging solutions to expedite schedule and reduce delays. A comprehensive risk assessment will be conducted after those options have been evaluated and a path forward determined.

### 3 COST SUMMARY

Effective February 2024 reporting period, BSVII adopted the Baseline Budget as submitted to FTA in Q1-2024 as part of VTA's application to enter the New Starts Engineering Phase. Section 3.1, 3.2, 3.3 and 3.4 reflect the baseline budget information and relevant cost information through this reporting period.

#### 3.1 SUMMARY COST REPORT

This section provides the summary cost report by Standard Cost Code (SCC) through this reporting period. Table 7 outlines the baseline budget by SCC, commitments in VTA's financial system (SAP) and forecasted expenditures as of this reporting period.

Based on an executed CP2 amendment #7 (EWP 3B) and forecasted CP2 amendment #8 (EWP 3C), budget transfers between unallocated contingency (SCC 90) and SCC 10-80 took place as reflected under approved changes. These amendments are not yet reflected in commitments, as VTA must approve the contractor schedule of values; this is anticipated to occur in upcoming periods. An increase in commitments is due to AT&T utility relocations, VTA labor costs and field office costs.

**Table 7 – Summary Cost Report (in \$M) \***

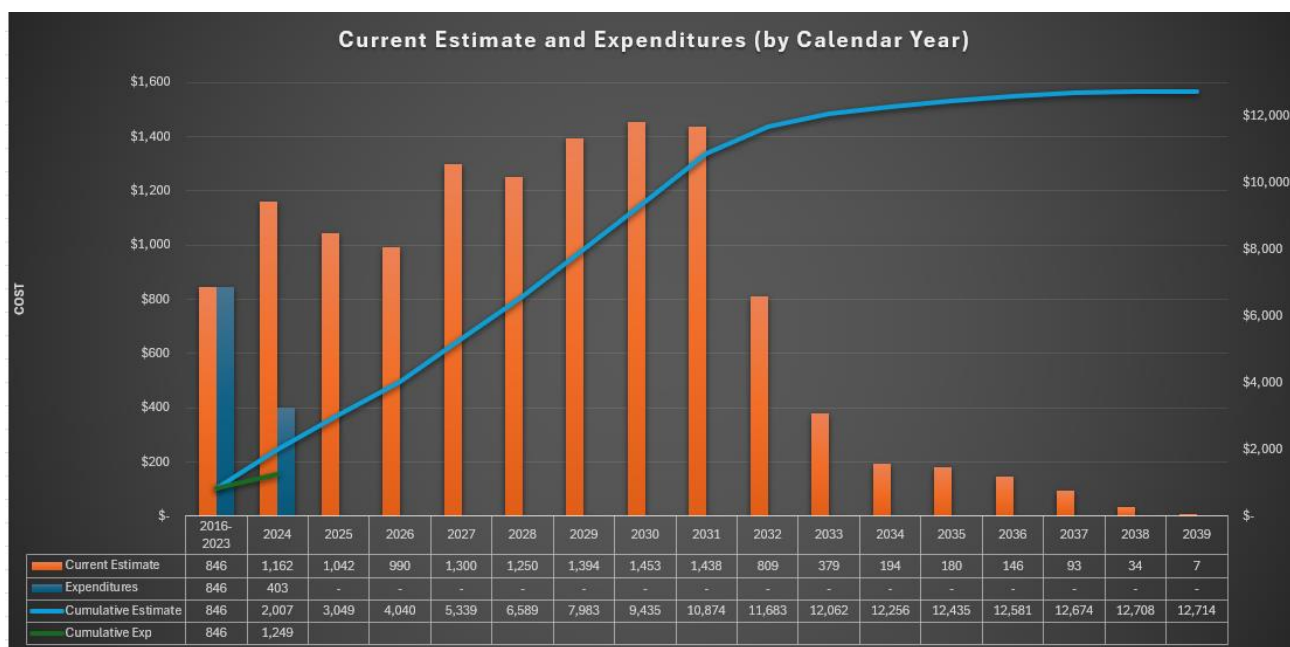
SCC - Description	Baseline Estimate	Approved Changes	Current Estimate	Commit - ments	Actuals Paid	Accruals **	Forecast	Forecast Variance to Current Estimate
10 – Guideway & Track	\$2,899.8	\$132.8	\$3,032.7	\$179.3	\$60.1	\$5.1	\$3,032.7	\$0
20 – Stations	\$2,037.2	\$0.0	\$2,037.2	\$0	\$0	\$0	\$2,037.2	\$0
30 – Yard, Shops, Yard Track	\$352.2	\$0.0	\$352.2	\$0	\$0	\$0	\$352.2	\$0
40 – Sitework, Spl Conditions	\$582.5	\$129.9	\$712.4	\$143.0	\$78.0	\$16.1	\$712.4	\$0
50 – Systems	\$1,409.0	\$0.0	\$1,409.0	\$0	\$0	\$0	\$1,409.0	\$0
60 – Right of Way	\$240.5	\$0.0	\$240.5	\$125.7	\$120.6	\$0.2	\$240.5	\$0
70 – Vehicles	\$204.8	(\$31.1)	\$173.7	\$104.8	\$12.1	\$0	\$173.7	\$0
80 – Professional Services	\$2,972.5	\$16.5	\$2,989.0	\$1062.2	\$910.3	\$46.3	\$2,989.0	\$0
90 – Unallocated Contingency	\$1,657.1	-\$279.2	\$1,377.9	\$0	\$0	\$0	\$1,377.9	\$0
100 – Finance Charges	\$390.0	\$0	\$390.0	\$0	\$0	\$0	\$390.0	\$0
<b>TOTAL</b>	<b>\$12,745.6</b>	<b>-\$31.1</b>	<b>\$12,714.5</b>	<b>\$1,615.0</b>	<b>\$1,181.0</b>	<b>\$67.7</b>	<b>\$12,714.5</b>	<b>\$0</b>

*Cost is rounded to hundredth thousands of million*

*\*Data excludes FTA ineligible/revised cashflow projections*

*\*\*Accruals include invoices received that are under review and/or forecasts of work performed as of this period but not yet invoiced*

Figure 2 outlines the draft cashflow by calendar year based on the current estimate. The cash flow is subject to change in the upcoming months. See Section 3.2 for budget transfer details. The time-phased information (Figure 3) reflecting the revised current budget will be updated to reflect the revised cashflow in an upcoming month accordingly.



**Figure 2 – Current Estimate and Expenditures by Calendar Year\***

As requested by the Board, Table 8 provides SCC 80 Baseline Budget breakdown rounded to closest million. Table 9 outlines the calendar year 2024 forecasted baseline budget breakdown for major contractors.

**Table 8 – SCC 80 breakdown (in \$M)\***

SCC 80 Category breakdown	Baseline Budget (in \$M)
Project Development, Engineering, and Final Design <i>(includes VTA, BART, Consultants, CP2 Design (by KST), Utility Owners Design)</i>	\$774
Project Management for Design and Construction; Design Support During Construction; Construction Administration and Management <i>(includes VTA, BART, Consultants, Office costs, IT, Supporting costs)</i>	\$1,593
Professional Liability Insurance and OCIP	\$435
Legal; Permits; Review Fees by other agencies, cities, Third Parties, etc.	\$78
Surveys, Testing, Investigation, Inspection <i>(includes VTA, BART, Consultants)</i>	\$27
Start up <i>(includes VTA, BART, Consultants)</i>	\$66
<b>TOTAL</b>	<b>\$2,973</b>

**Table 9 – Major Contractor SCC 80 Calendar Year 2024 Budget breakdown (in \$M)**

SCC 80 – Major Contractor/Consultant	Category	Calendar Year 2024 Baseline Budget (in \$M) <sup>2</sup>
CP2 (KST JV) <sup>1</sup>	Engineering/Final Design	\$148
Program Management Team (HNTB-WSP JV)	Project Management for Design and Construction	\$49
General Engineering Consultant (MMD-PGH Wong JV)	Engineering/Final Design. Design Support During Construction	\$111
Construction Management Consultant (Bechtel)	Construction Administration and Management	\$7
<b>TOTAL</b>		<b>\$315</b>

<sup>1</sup>KST JV has other forecasted costs in other SCCs.

<sup>2</sup>Baseline Budget refers to forecasted expenditures rounded to closest millions. Task Orders/Commitments are not yet authorized for the entire calendar year.

## 3.2 BUDGET TRANSFERS AND CONTINGENCY UPDATES

This section outlines the work in progress and executed budget transfers to date against the baseline budget.

### Executed this period

Based on EWP 3B execution (Amendment #7) and EWP 3C negotiated value (Amendment #8), one budget transfer was executed this month. EWP 3B value of \$35M drew approximately \$30M unallocated contingency while EWP 3C drew approximately \$194M unallocated contingency (SCC 90).

### Under development or under final review:

1. Budget transfers to reflect scope transfers between CPs.

**Contingency Summary:** Table 10 outlines the BSVII allocated and unallocated contingency updates based on the budget transfers.

**Table 10 – Contingency Summary (in \$M)**

SCC - Description	Baseline Contingency	Contingency changes	Remaining Contingency
SCC 10-80 Allocated Contingency	\$1,462.4	-\$52.7	\$1,409.7
SCC 90 – Unallocated Contingency	\$1,657.1	-\$279.2	\$1,377.9
<b>Total</b>	<b>\$3,119.5</b>	<b>-\$331.9</b>	<b>\$2,785.5</b>

### Contingency Drawdown:

Based on EWP 3B execution and EWP 3C negotiated value, a total of \$259M was drawn down from both allocated and unallocated (SCC 90) contingencies. The EWP 3B commitment of \$35M drew approximately \$30M unallocated contingency, while EWP 3C drew approximately \$194M unallocated contingency. In total, approximately \$225M of unallocated contingency (SCC 90) was drawn down because of Amendments #7 and #8. Based on these amendments, the total program contingency drawdown to date (allocated & unallocated) is approximately \$332M.

## 3.3 ACTIVE CONTRACTS

There were other amendments executed as part of the BSVII program budget that impacted the commitments in SAP. The CP2 contract value has been updated to reflect the recently executed Unilateral Change Order. Major active contract values are shown in Table 11, Table 11 provides a list of major active contracts and Table 12 provides a list of other active contracts. Appendix A provides the subconsultants and subcontractors for the Major Active Contracts (excluding V24117) identified in Table 11.

**Table 11 – Major Active Contracts**

Contract No.	Vendor Name	Description	Total Contract Value
V22021	Kiewit Shea Traylor Joint Venture	BSVII CP2 Tunnel and Trackwork PDB Contractor	\$639.6M
S17017	HNTB/PB Joint Venture	BSVII Program Management Services	\$191.6M
S18088	MMW Joint Venture	BSVII General Engineering Services	\$342.8M
V23174	Bechtel Infrastructure Corporation	BSVII Construction Management Services	\$490.8M
V24117	BART (Alstom)	BSVII BART Vehicles	\$172.6M

**Table 12 – Other Active Contracts**

Contract No.	Vendor Name	Description
P20071	Insight Public Sector Inc,	BSVII CISCO SMARTNET
S16043	Hexagon Transportation, Consultants	TRAFFIC FORECASTING SERVICES
S18202	Comcast Cable Communications Mgmt.,	BSVII COMCAST VOIP INSTALLATION & CONFIG
S18210	Kastle Systems of Los Angeles, Par	BSVII CARD READERS FOR GATEWAY 2033
S18230	State Water Resources Control Board	BSVII COST RECOVERY OVERSIGHT
S19216	JRP Historical Consulting LLC,	BSVII HISTORICAL ARCHITECTURAL SERVICES (On Call)
S20020	Transit Project Strategies LLC,	BSVII PROGRAM DELIVERY CONSULTING SVCS
S20134	JH Albert International Insurance,	BSVII OCIP FEASIBILITY STUDY SERVICES
S20161	Nossaman LLP,	BSVII CONTRACT DEV & PROGRAM LEGAL ADV
S20248	Peninsula Corridor, Joint Powers Bo	BSVII COOPERATIVE AGREEMENT
S20250	Dodge Data & Analytics,	BSVII PO FOR ADVERTISING SOLICITATIONS
S21023	Kiefer Consulting Inc,	BSVII TECHNOLOGY PROFESSIONAL SERVICES
S21171	Lubin Olson & Niewiadomski LLP,	BSVII LUBIN OLSON & NIEWIADOMSKI LLP
V21080	PEACOCK ENTERPRISES INC., DBA PEACO	BSVII ADOBE SOFTWARE LICENSES
V21113	Montague Premier Inc,	BSVII PROJECT VEHICLES CAR WASHES
V21220	Kastle Systems of Los Angeles, Par	BSVII ACCESS CONTROL/CCTV 2830 DELACRUZ
V21225	DLT Solutions LLC, DLT Solutions	BSVII AUTODESK AEC LICENSES
V21236	City of San Jose,	BSVII MOU TO CONSULT AND COOPERATE
V21216	Santa Clara City of, Finance Depart	BSVII MOU TO CONSULT AND COOPERATE
V21263	Pacific Gas & Electric Company,	BSVII TEMPORARY POWER STUDY
V21264	Pacific Gas & Electric Company,	BSVII TUNNEL IMPACT STUDY
V21339	Sprint, Sprint Solutions Inc	SPRINT UTILITY RELOCATION
V21345	Consultant Specialists Inc,	BSVII IT STAFFING
V21346	Environmental Systems Research, Ins	BSVII ARCGIS LICENSES
V21355	Synergy Corporate Technologies, Ltd.	BSVII NINTEX WORKFLOW ENTERPRISE EDITION
V21366	Perforce Software, Inc.,	BSVII HELIX REQUIREMENTS MANAGEMENT
V21367	DLT Solutions LLC, DLT Solutions	BSVII AUTODESK BIM 360 SUBSCRIPTION
V22016	San Jose Water Company,	BSVII SJWC FACILITY RELOCATIONS
V22171	HDR Engineering Inc,	BSVII FINANCIAL MODELING SUPPORT
V23045	Union Pacific Rail Road	PRELIMINARY ENGINEERING
V21238	PEACOCK ENTERPRISES INC., DBA PEACO	BSVII BLUEBEAM REVU EXTREME OPEN LICENSE
S16050	Meyers Nave, A Professional Corpora	BSVII PHASE II LEGAL SERVICES
S18313	Hanson Bridgett LLP,	BSVII DESIGN BUILD LEGAL SERVICES
V21216	CVE Contracting Group Inc.	LAS PLUMAS ABATEMENT AND DEMOLITION
V22188	Mythics, Inc,	ORACLE ACONEX Document Control Software
V23009	PEACOCK ENTERPRISES INC., DBA PEACO	BSV II- HPE Hardware & Software Support
V23017	Cushman & Wakefield	Commercial Broker to Sublease Gateway Offices



Contract No.	Vendor Name	Description
V23104	Insight Public Sector, Inc.	Workflow Management System
P18240	PCMG Inc,	BSVII PROJECT OFFICE DESKTOP COMP
S20166	San Francisco Bay Area Rapid, Trans	BSVII BART IMPLEMENTATION LETTER #43
V21150	Insight Public Sector, Inc.,	BSVII SOPHOS INTERCEPT X
V22239	Insight	DTV CCTV RECORDER
V22240	SHI	DTV CCTV SWITCH

### 3.4 FUNDING SUMMARY

Table 13 – Funding Summary provides a snapshot of funding summary. Appropriations, and expended costs through November 2024 are from VTA's Financial System (SAP).

**Table 13 – Funding Summary (in \$M)**

Funding Source	Original Planned Funding*	Forecasted Funding**	Appropriated***	Expended
Federal - FTA New Starts Program	\$6,296	\$5,098	\$0	\$0
TIRCP	\$750	\$750	\$0	\$0
Other State Funding	\$750	\$750	\$0	\$0
Regional Measure 3 (RM3)	\$375	\$375	\$0	\$0
2000 Measure A Sales Tax	\$2,062	\$2,062	\$1,595	\$726
2016 Measure B Sales Tax	\$2,512	\$2,512	\$725	\$455
Supplemental 2000 Measure A Sales Tax	\$0	\$502	\$0	\$0
Funding Gap – TBD	\$0	\$664	\$0	\$0
<b>Total Sources of Funds</b>	<b>\$12,746</b>	<b>\$12,714</b>	<b>\$2,320</b>	<b>\$1,181</b>

Cost is rounded to closest million

\*Original Planned funding is per the SCC workbook submitted under NSEE application in March 2024.

\*\*Forecasted Funding is based on FTA's forecast allocation to VTA BSVII under NSE acceptance. Supplemental 2000 Measure A Sales Tax is a new funding source identified by VTA to help mitigate the funding gap. Overall Forecasted funding values are tentative, work in progress and subject to change.

\*\*\* Appropriations by the VTA Board through FY2025 forecasted \$5,424M; Table 11 includes only the grantor authorized amounts and excludes MTC/FTA allocated funds.



## 4 CHANGE SUMMARY

This section outlines configuration changes at the program level and CP2 contract amendment status.

### 4.1 CONFIGURATION CHANGES

All the prior configuration changes have been superseded by the new baseline submittal to FTA. Three configuration changes were executed in July 2024. Table 14 reflects current status of the configuration changes.

**Table 14 – Configuration Changes**

CCS-ID	CCS - Title	Status	CP*	RSD impacts	Net Budget Impact
CCR-001/002/003	Approved Value Engineering Concepts	Approved	PWD	None	None

\*CP = Contract Package (CP1, 2, 3, 4, or PWD-Program-Wide)

### 4.2 CP2 CONTRACT AMENDMENTS

Status of identified amendments is reflected in Table 15. *Update as of December 20, 2024 : Amendments 6 and 8 have been executed in December 2024 and will be updated in the upcoming reporting periods.*

**Table 15 – CP2 Contract Amendments**

Amendment-ID	Scope	Status	Schedule impacts	Overall Budget Impact	Estimated Value*
001	TBM Procurement (EWP 1A)	Executed	Overall schedule and budget were not impacted. Budget transfer (excluding EWP 3C.1) for Amendments 1-5 and CO 3 was executed.		\$144M
002	Additional Design Funds	Executed			\$43M
003	EWP 3A, 7A, 11A, Stage 1 Bond	Executed			\$110M
004	EWP 3C.1 – LNTP, EWP 11B, PCO-002	Executed			\$44M
005	D10 Design progression thru AFC; Pending 85% design funds, Bond	Executed			\$21M
UCO1	Unilateral Change Order for certain design changes	Executed			\$7M
006	Revised contract terms	Negotiations complete, pending execution	TBD	TBD	\$0
007	EWP 3B	Executed	None	\$30M Unallocated contingency drawdown	\$35M
008	EWP 3C.2	Negotiations complete, pending board action	+5 months (4 months contingency drawdown)	\$194M Unallocated Contingency drawdown	\$398M

\*Cost rounded to nearest million

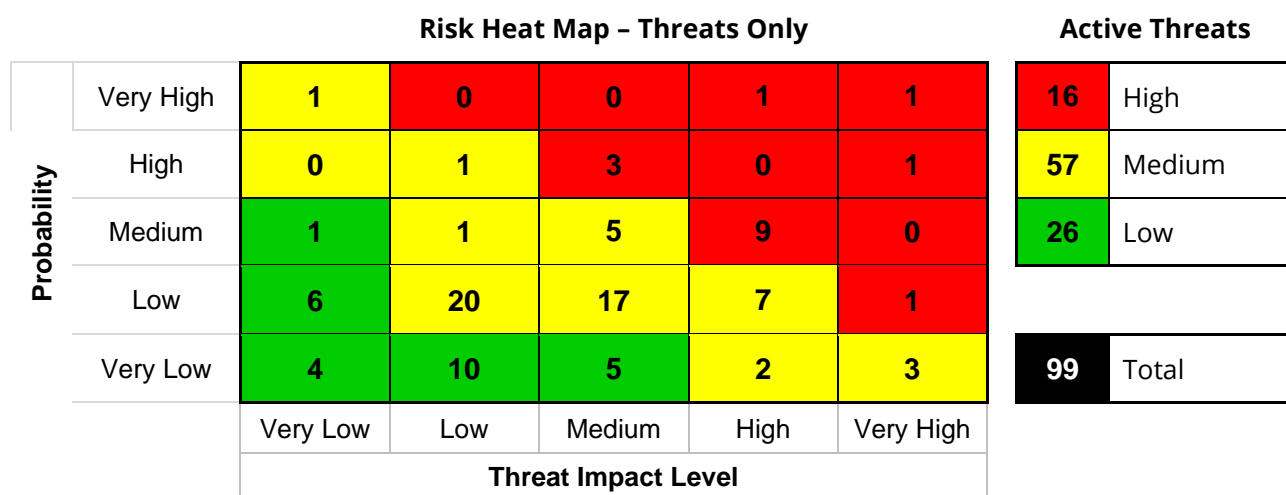
## 5 RISK SUMMARY

This section covers the summary risk updates as of the November 2024 reporting period. During this reporting period risk assessments of some risks were revised and the total number of active risks stayed at 113 (including threats and opportunities) as summarized in Table 16.

**Table 16 – Qualitative Risk Summary**

Risk Type	As of October 31, 2024	As of November 30, 2024	Change
<b>Threats</b>	99	99	0
<b>Opportunities</b>	14	14	0
<b>Total Number of Risks</b>	<b>113</b>	<b>113</b>	<b>0</b>

Figure 3 is the active risk heat map for threats only based on updates through this reporting period.



**Figure 3 – Risk Heat Map – Threats only**

Table 17 shows the top risks (threats) identified in the current risk register as of this reporting period.

**Table 17 – Top Risks – Threats only**

Risk ID	Risk Title	Action Plan
BSV-203	Higher cost of the West Portal TBM launch facility	Finalize Amendment #8 for VTA Board approval in December 2024. Explore limited NTP for KST to start construction.
BSV-196	Failure to secure a lump-sum price with KST resulting in off-ramp.	VTA has set up a task force to determine the best approach for implementing Stage 2 scope including partial off-ramps, industry outreach, risk sharing etc.
BSV-218	Delayed start of EWP 3C pushing critical path work but within NSEE approved baseline	Obtain VTA Board approval for the full value of EWP 3C and utilize LNTP to minimize schedule delays.
BSV-215	FFGA execution delays	VTA is working on various tasks, including coordination with FTA on FFGA timing.
BSV-005	Unanticipated damage to historic buildings, critical utilities & other structures	KST to develop instrumentation and monitoring programs for sensitive structures. VTA to support KST in obtaining access as appropriate.

Risk ID	Risk Title	Action Plan
BSV-214	Diridon Station design changes due to stakeholders' input	Following the discussion with the Diridon Business Case Team, City staff and design optimization effort, preparing a summary referral report as part of the staff recommendation; A joint task force including other Diridon area stakeholders has been established to collaboratively review design alternatives and assess trade-offs.
BSV-029	VTA financial capacity / funding plan to finance potential future project cost increases	Update the financial plan following completion of cost estimates and agreement with FTA on project cost.
BSV-036	General construction labor shortage / labor premiums	Continue to monitor economic trends and impacts; increase industry outreach efforts.
BSV-096	Testing and Commissioning delays due to various factors	Schedule includes significant contingency, which is currently allocated towards the end of the project during testing phase (late 2030's). Implement Phase 1 lessons learned.

## 6 OTHER UPDATES

### 6.1 KST (CP2 PDB) CONTRACT SUMMARY

Table 18 outlines the Cost summary of the CP2 Contractor.

**Table 18 – CP2 (KST) Cost Summary through November 2024**

Item	Cost (in \$M)
Original Contract Value (Stage 1 only)*** (A)	\$235.0
Amendments issued to Date (B)	\$404.6
Revised Contract Value (Stage 1 only)*** (C) =(A)+(B)	\$639.6
Expenditures this period*	\$22.7
Expenditures to Date* (D)	\$419.6
Remaining Authorization Value** (C) - (D)	\$220.0

\*Expenditures include actuals, accrual values that are not yet approved by VTA, retention and are subject to change.

\*\*Remaining Authorization Value is subject to change based on expenditure approximations.

\*\*\* Stage 1 Bond Value that was previously captured under Original Contract Value until Jan 2024 reporting period is now in Amendments line item.

### 6.2 RIGHT OF WAY (ROW)

Table 19 – Real Estate Status Summary below provides a high-level summary of the acquisition status as of end of November 2024. Right of Way work continues to progress.

**Table 19 – Real Estate Status Summary**

PROJECT ACQUISITION STATUS					
Description	Total	Possession Obtained	Parcels in Acquisition Process	Relocation****	
				Required	Completed
<b>Total Parcels*</b>	<b>77</b>	<b>29</b>	<b>48</b>	<b>37</b>	<b>21</b>
BPE (& Other Takes**)	4	0	4	3	0
Full Fee Only	9	7	2	15	9
Multiple Takes (not incl. BPEs)	3	1	2	15	12
Tunnel Easement	47	20	27	0	0
Roadway Easement	3	0	3	0	0
Utility Easement	4	0	4	0	0
Temporary Construction Easement	7	1	6	4	0

\* Six Building Protective Easements were removed due to elimination of DTSJ Secondary HH; Pending Property Protection Study report

\*\* BPE: Building Protective Easements - Parcels may have additional acquisitions, such as Tieback Easement

\*\*\*\* Represents total tenants to be relocated, not parcels

### 6.3 UTILITIES

Figure 4 outlines the summary status of Utility Relocations.

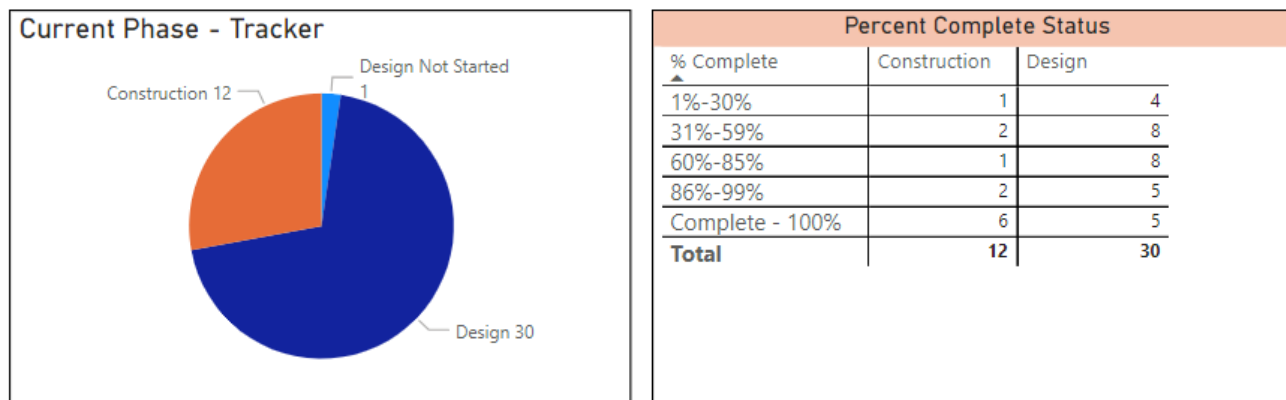


Figure 4 – Utilities Summary

## 6.4 THIRD PARTY AND PERMITS

The open critical agreement (UPRR Mitigation and Reimbursement Agreement for West Portal Early Works) is under negotiations with UPRR. Table 20 outlines the summary of third-party agreements categorizations.

Table 20 – Third Party Agreements Categorization

Category	Total Executed	Forecasted for execution in CY 2024	Future forecasted execution	Total
Critical for FFGA	30	1	0	31
Critical for post-FFGA (Construction)	0	0	4	4
Critical for post-FFGA (Operations)	1	0	5	6
Non-Critical Agreements	2	0	0	2
<b>Total</b>	<b>33</b>	<b>1</b>	<b>9</b>	<b>43</b>

## 6.5 PMT CONTRACT SUMMARY

Table 21 shows the HNTB-WSP Contract Summary and executed Task Orders to date.

The Program Management Team supports VTA in the delivery of BSVII in the following areas:

- Management of Program wide functions: Safety and Security, Quality, External affairs (incl. Outreach, Third Party Coordination), BART Engagement, Requirements management, Interface Management, IT Support, Right of Way Coordination, Utility Relocation Coordination and Oversight.
- Program Controls Support: Program Schedule Development and Management, Program Cost Management, Risk Management, Reporting, Development/Validation of Independent Cost Estimates
- Management of CP2 Contract: Project Management, Contract Management and Engineering Management.
- Management of General Engineering Consultant (GEC) and Construction Management Consultant (CMS).

e. FTA Grant Support and other as-needed support.

**Table 21 – Program Management Team Contract Summary**

Task Order Number	Task Order Status	Period Start and End	Authorized Task Orders/Final Commitments	Incurred to Date	Incurred / Forecast* (Per Task Order)	Incurred / Forecast* (Cumulative)	S17017 Contract Balance based on Forecast*
All Costs in Millions and rounded							
<b>S17017 Contract Value:</b>		<b>\$ 191.6</b>					
Task Order 1	Closed	Nov 2017 to Jun 2018	\$ 18.2	\$ 18.2	\$ 18.2	\$ 18.2	\$ 173.3
Task Order 2	Closed	Jul 2018 to Jun 2019	\$ 25.7	\$ 25.7	\$ 25.7	\$ 44.0	\$ 147.6
Task Order 3	Completed.	Jul 2019 to Oct 2020	\$ 28.8	\$ 28.8	\$ 28.8	\$ 72.8	\$ 118.8
Task Order 4	Completed.	Nov 2020 to Aug 2021	\$ 17.7	\$ 17.7	\$ 17.7	\$ 90.4	\$ 101.1
Task Order 5	Completed.	Aug 2021 to Jun 2022	\$ 15.6	\$ 15.6	\$ 15.6	\$ 106.0	\$ 85.6
Task Order 6	Completed.	Jul 2022 to Feb 2023	\$ 12.4	\$ 12.4	\$ 12.4	\$ 118.4	\$ 73.2
Task Order 7	Completed.	Feb 2023 to Jun 2023	\$ 10.0	\$ 10.0	\$ 10.0	\$ 128.3	\$ 63.3
Task Order 8*	Completed. Pending final closure	July 2023 to Dec 2023	\$ 18.2	\$ 18.0	\$ 18.2	\$ 146.5	\$ 45.1
Task Order 9 <sup>(1)</sup>	In Progress	Jan 2024 to January 2025	\$ 45.1	\$ 37.3	\$ 45.1	\$ 191.6	\$ -
<b>S17017 Contract Total:</b>			<b>\$ 191.6</b>	<b>\$ 183.6</b>		<b>\$ 191.6</b>	<b>\$ -</b>

\* Forecast is projected and subject to change

(1) Amendments were issued for extending task order 9 through January 2025; VTA and PMT are working through revising the value.

## 6.6 GEC CONTRACT SUMMARY

Table 22 shows the MMD-PGH Wong Contract Summary and executed Task Orders to date.

Task Order 11 was amended to extend the services through December 2024.

The GEC supports VTA in the delivery of BSVII in the following areas:

- a. Progression of design development of Construction Package (CP) 1 (Systems), CP3 (Newhall Yard and Santa Clara Station) and CP4 (Underground Stations)
- b. Design criteria manual configuration, design integration, requirements, cost estimate development for CP1, CP3 and CP4.
- c. Design support during construction for all CPs.
- d. Others as needed support to VTA, PMT.



**Table 22 – General Engineering Consultant Contract Summary**

Task Order (TO) Number	Task Order Status	Period Start and End	Authorized Not to Exceed amount (TO)	Incurred to Date	Incurred / Forecast* (Per Task Order)	Incurred / Forecast* (Cumulative)	\$18088 Contract Balance
<b>\$18088 Contract Value --&gt;</b>		<b>342.8</b>					
Task Order 1	Closed	Apr 2019 to Jun 2019	\$ 3.4	\$ 3.4	\$ 3.4	\$ 3.4	\$ 339.3
Task Order 2	Closed	Apr 2019 to Jan 2021	\$ 35.9	\$ 35.9	\$ 35.9	\$ 39.3	\$ 303.4
Task Order 3	Closed	Aug 2019 to Sep 2020	\$ 1.5	\$ 1.5	\$ 1.5	\$ 40.8	\$ 301.9
Task Order 4	Closed	Mar 2020 to Oct 2020	\$ 20.7	\$ 20.7	\$ 20.7	\$ 61.5	\$ 281.2
Task Order 5	Closed	Nov 2020 to Aug 2021	\$ 46.5	\$ 46.5	\$ 46.5	\$ 108.1	\$ 234.7
Task Order 6	Closed	Dec 2020 to Aug 2021	\$ 0.6	\$ 0.6	\$ 0.6	\$ 108.7	\$ 234.1
Task Order 7	Closed	Aug 2021 to Jun 2022	\$ 37.9	\$ 37.9	\$ 37.9	\$ 146.6	\$ 196.1
Task Order 8	Completed. Pending closure	Apr 2022 to Jun 2023	\$ 0.9	\$ 0.9	\$ 0.9	\$ 147.5	\$ 195.2
Task Order 9	Completed. Pending closure	Jul 2022 to Dec 2022	\$ 17.3	\$ 17.0	\$ 17.0	\$ 164.5	\$ 178.2
Task Order 10	Completed. Pending closure	Jan 2023 to Jun 2023	\$ 32.2	\$ 30.1	\$ 30.1	\$ 194.6	\$ 148.1
Task Order 11	In Progress	Jul 2023 to Dec 2024	\$ 117.4	\$ 111.9	\$ 117.4	\$ 312.0	\$ 30.7
Task Order 12	Completed. Pending closure	Sep 2023 to Oct 2023	\$ 0.04	\$ 0.04	\$ 0.04	\$ 312.1	\$ 30.7
	Remaining Contract Balance	March 2024 to Dec 2026			TBD	TBD	\$ 30.7
<b>\$18088 Contract Total:</b>			<b>\$ 314.4</b>	<b>\$ 306.6</b>	<b>\$ 312.1</b>	<b>\$ 30.7</b>	

\* Forecast is projected and subject to change.  
Cost rounded to closest millions

## 6.7 CMS CONTRACT SUMMARY

Table 23 shows the Bechtel Contract Summary with executed Annual Work Plans to date.

Because the CM is still in the process of onboarding, the current work order is limited to mobilization and onboarding tasks.

**Table 23 – Construction Management Services Contract Summary**

AWP	Status	Period Start and End	Authorized Not to Exceed AWP amount	Incurred to Date	AWP Incurred / Forecast*	Incurred / Forecast* (Cumulative)	V23194 Contract Balance
<b>V23194 Contract Value --&gt;</b>		<b>490.8</b>					
AWP 1	In Progress	May 2024 to December 2024	\$ 6.6	\$ 2.0	\$ 6.6	\$ 6.6	\$ 484.2

\* Forecast is projected and subject to change.  
Cost rounded to closest millions

# APPENDIX A – MAJOR CONTRACTS SUBCONSULTANTS LIST

## S17017 – HNTB+PB Joint Venture APPROVED SUBCONTRACTORS

(New subcontractors listed in Green)

FIRM	ADDRESS	AREA OF RESPONSIBILITY	DBE
Aldea Services*	5940 Frederick Crossing Lane Suite 101 Frederick, MD 21704	Underground Construction Risk.	
Abtahi Engineering Management Consulting	7 El Caminito Orinda, CA, 94563-2301 Phone: (925) 525-7565	Third Party Agreements & Permits	
BKF Engineers	1730 N. First Street, Suite 600 San Jose, CA 95112 Phone: (408) 467-9140	Utility Coordination	
Business Models, Inc.	1049 Market Street #608 San Francisco, CA 94103	Co-Innovation workshop design & facilitation	
Capital Project Strategies, LLC	873 Old Holly Dr. Great Falls, VA 22066	DB Procurement and Public Private Project Strategy	
Construction Engineering Consulting Group, Inc.	Mailing Address: PO Box 3279 Chico, CA 95927 Office Address: 1550 Humboldt Rd., Suite 5 Chico, CA 95928 Phone: (925) 548-7476	Construction Contract Advisory Panel	
Coppersmith Consulting, Inc.	2121 N. California Blvd., #290, Walnut Creek, CA 94596 Phone: (925) 974-3335	Structural Geological Specialist	
Cordoba Corporation	461 Second Street, Suite 454T San Francisco, CA 94107 Phone: (562) 587-1031	Project Controls Support	X
David Klahr Consulting, Inc.	7205 Galgate Dr. Springfield, VA. 22153	Emerging transportation business case assessment, procurement methods, and adoption strategies, and monetization and value capture alternatives	
DEENSCORP	2175 The Alameda, Suite 100 San Jose, CA 95126 Phone: (408) 345-3860	Civil Engineering	X
DTA	5000 Birch St., Suite 6000 Newport Beach, CA 92660 Phone: (949) 955-1500	Financial Data	
Ed Cording	119 W. Huntingdon Street Savannah, GA 31401 Phone: (217) 369-7122	Tunneling Peer Review	



VTA's BART SILICON VALLEY PHASE II EXTENSION PROJECT  
VTA BSVII Executive Monthly Progress Report

FIRM	ADDRESS	AREA OF RESPONSIBILITY	DBE
Elle Consultants**	1536 Barcelona Dr El Dorado Hills, CA 95762	Cost Estimating Services	
Gall Zeidler Consultants	1990 N. California Blvd, 8th Floor Walnut Creek, CA 94596 Phone: (646) 206-1606	Tunneling Peer Review	
Gayln Rippentrop	PO Box 89321 Sioux Falls, SD 57109	Construction Methodologies Expert Consultant, Cut & Cover Workshops	
GDC Constructors, Inc.	4204 Brynwood Dr. Naples, FL 34119 Phone: (239) 289-2901	Construction Methodologies Expert Consultant, Cut & Cover Workshops	
Gregg Korbin	1167 Brown Avenue Lafayette, CA 94549 Phone: (925) 284-9017	Tunneling Peer Review	
Hexagon Transportation Consultants	100 Century Center Court, Suite 501 San Jose, CA 95112 Phone: (408) 971-6100	Traffic Engineering	
Intueor Consulting, Inc.	7700 Irvine Center Dr., Suite 470 Irvine, CA 92618 Phone: (949) 753-9011	Project Controls Team Augmentation, Cost Control, Analysis & Scheduling Services	X
Jim Rollings	2311 Greenwood Avenue Wilmette, IL Phone: (312) 953-0508	Strategic Advisory Panel	
JCK Underground, Inc.	25 Dorchester Avenue, #51549 Boston, MA, 02205 Phone: (857) 294-1317	Strategic Advisory Panel	
Jensen Hughes*	10170 Church Ranch Way, Suite 200 Westminster, CO 80021	Accessibility Consulting Services	
Joe Urbas	925 Kirby Drive Fort Mill, SC 29715 Phone: (360) 430-2393	Fire Life Safety Expert Consultant	
John Gaul	331 Isabella Ave. Staten Island, NY 10306-4555	BART Operations Expert Consultant	
Josephine's Professional Staffing	2158 Ringwood Avenue San Jose, CA 95131 Phone: (408) 943-0111	Document Control, Administrative Support	X
Keish Environmental	6768 Crosby Court San Jose, CA 95129 Phone: (408) 592-0223	Environmental Compliance	X
Kimley-Horn Associates	401 B Street #600 San Diego, CA 92101 Phone: 650237.9651	Public Relations & Outreach	
KivettConsult	5600 Wisconsin Ave. Apt 1209 Chevy Chase, MD 20815	Station & Tunnel Ventilation Design	
KTW Consulting LLC	160 Marietta Drive San Francisco, CA 94127 Phone: (510) 368-1776	Rail Systems Consulting	



<b>FIRM</b>	<b>ADDRESS</b>	<b>AREA OF RESPONSIBILITY</b>	<b>DBE</b>
Lettis Consultants International, Inc.	1981 N. Broady, Ste. 330 Walnut Creek, CA 94596 Phone: (925) 482-0360 x202	Environmental Compliance	
Markus Thewes	Ruhr-University Bochum Universitaetsstr 150, IC 6-127, 44801 Bochum, Germany Phone: +49 234 32 28061	Tunneling Peer Review	
Michael Glikin	135 Ocean Parkway 2M Brooklyn, New York 11218	BSV Ph II independent fleet and storage requirements assessment	
The National Constructors' Group	635 Chaparral Circle P.O. Box 2890 Napa, CA 94558-0537	Constructability Review, Estimate Review	
NorCal Geophysical Consultants, Inc.	321 Blodgett St. Suite A Cotati, CA 94931 Phone: (707) 796-7170	Geophysics Surveying and Testing	
Parikh Consultants, Inc.	1497 N Milpitas Blvd, Milpitas, CA 95035 Phone: (408) 452-9000	Geotechnical	<b>X</b>
Quality Engineering, Inc.	Quality Engineering, Inc. 1281 30th Street, Suite 100 Oakland, CA 94608 Phone: (510) 377-6050	Project Quality Consulting & Services	<b>X</b>
RailPros, Inc.	15265 Alton Pkwy, Suite 140 Irvine, CA 95618	Represent VTA's Interests in meetings with Union Pacific	
RHA, LLC	6677 West Thunderbird Suite K183 Glendale, AZ 85306	Facilitation of Value Engineering Methodologies	<b>X</b>
Richard A. Sage, LLC	18624 116th Street, SE Snohomish, WA 98290 Phone: (425) 530-7823	Construction Methodologies Expert Consultant, Cut & Cover Workshops	
Richard F. Clarke	9391 Painted Canyon Circle Littleton, CO 80129 Phone: (303) 653-2475	Independent Peer Review Panel Member	
Singer Associates, Inc.	47 Kearny Street, 2nd Floor San Francisco, CA 94108 Phone: (415) 227-9700	Public Relations & Outreach	
Sunrise Pacific	460 Center Street, Suite 6168 Moraga, CA 94570 Phone: (925) 247-4266	Controls Support	<b>X</b>
TechTU Business Solutions, Inc.	4900 Hopyard Road, Suite #100 Pleasanton, CA 94588 Phone: (925) 468-4174	Document Control, Administrative Support	<b>X</b>
Transportation Technology Center, Inc.	55500 DOT Road Pueblo, CO 81001 Phone: (719) 585-1811	BART Infrastructure, practices and operations	
Underground Command & Safety, LLC	23415 67 Lane SW Vashon, WA 98070 Phone: (206) 940-9177	Fire Load & Incident Response Expert Consultant	



FIRM	ADDRESS	AREA OF RESPONSIBILITY	DBE
WRECO	1243 Alpine Road, Suite 108 Walnut Creek, CA 94596 Phone: (925) 941-0017 X201	Hydraulics and Hydrology	X

\* Effective Date November 1, 2023

\*\* Effective Date August 1, 2023.

CONTRACT S18088 – MMW Joint Venture  
APPROVED MMW SUBCONTRACTORS

Firm Name	Address	DBE or SBE Certification	Discipline
3Vi, Inc.	2603 Camino Ramon, Suite 200 San Ramon, CA 94583	DBE/SBE	Electrical Engineering
Alliance Engineering Consultants, Inc.	4701 Patrick Henry Drive, Bldg. 10 Santa Clara, CA 95054	DBE/SBE	Electrical Engineering
Anil Verma Associates, Inc.	1970 Broadway, Ste #668 Oakland, CA 94612	DBE/SBE	Architectural Design
Acoustic Strategies, Inc. (ATS)	215 N. Marengo Ave., Ste# 100 Pasadena, CA 91101	SBE Only	Noise/Vibration
BA Inc.	555 W 5th St. Suite 35th floor Los Angeles, CA 90013	DBE/SBE	General Engineering Resource
Bennett Engineering Services	1082 Sunrise Avenue, Suite 100 Roseville, CA 95661	DBE/SBE	Traffic Engineering
Biggs Cardosa Associates	865 The Alameda San Jose, CA 95126	None	Structural Engineering
CPM Associates, Inc.	65 McCoppin Street San Francisco, CA 94103	SBE Only	Project Controls
Corrpro Companies, Inc.	20991 Cabot Blvd Hayward, CA 94544	None	Corrosion Engineering Services
Fehr & Peers	160 W. Santa Clara Street, Ste #675 San Jose, CA 95113	None	Station Circulation and CTMP
FMG Architects	330 15 <sup>th</sup> Street Oakland, CA 94612	DBE/SBE	Architectural Design

<b>Firm Name</b>	<b>Address</b>	<b>DBE or SBE Certification</b>	<b>Discipline</b>
Foster + Partners	1000 Sansome Street, Ste #240 San Francisco, CA 94111	None	Architectural Design
GeoPentech, Inc	101 Academy, Ste # 100 Irvine, CA 92617	SBE Only	Geotechnical Engineering
Gregg Drilling, LLC	950 Howe Road Martinez, CA 94553	None	Geotechnical Exploratory Drilling
HMH Engineers	1570 Oakland Road San Jose, CA 95131	SBE Only	Survey Utilities
JCL Consulting Group	93 Wapello Street Altadena, CA 91001	DBE/SBE	Community/Business Outreach Specialist
Josephine's Professional Staffing, Inc.	2158 Ringwood Avenue San Jose, CA 95131	DBE/SBE	Administrative/ Project Management Augmentation
Krebs Corporation	1840 Sun Peak Dr., Suite B-102 Park City, UT 84098	None	Estimating
Lamoreaux Associates, Inc.	2686 North 775 West Cedar City, UT 84721	SBE Only	Systems Design
Lerch Bates, Inc.	9780 S. Meridian Blvd Suite 450 Englewood, CO 80112	None	Vertical Transport Consultant
Merrill Morris Partners	249 Front Street San Francisco, CA 94111	DBE/SBE	Landscape Architect
MxV Rail	350 Keeler Parkway Pueblo, CO 81001	None	Trackwork Design Advisor
NORCAL Geophysical Consultants, Inc.	321A Blodgett Street Cotati, CA 94931	None	Geotechnical/Geophysical Logging Survey
Parikh Consultants, Inc	2360 Qume Drive, Suite A San Jose, CA 95131	DBE/SBE	Geotechnical Services
Pitcher Services, LLC	218 Demeter Street East Palo Alto, CA 94303	None	Geotechnical Exploratory Drilling (Contractor)
Robin Chiang & Company	381 Tehama Street San Francisco, CA 94103	DBE/SBE	Architectural Design



<b>Firm Name</b>	<b>Address</b>	<b>DBE or SBE Certification</b>	<b>Discipline</b>
Ross Infrastructure Development	555 4th St. Ste #927 San Francisco, CA 94107	None	TOJD Project Elements
Schaaf & Wheeler	4699 Old Ironsides Rd. , Ste. 350, Santa Clara, CA 95054	SBE	Hydrology Services
SOHA Engineers	48 Colin P. Kelly Jr. Street San Francisco, CA 94107	DBE/SBE	Structural Engineering
STV Incorporated	505 14 <sup>th</sup> Street, Suite 1060 Oakland, CA 94612	None	A/E design services – NMF, Santa Clara Station
Sunrise Pacific, Inc.	PO BOX 6168 Moraga CA 94556	DBE/SBE	General Engineering Services
TEC-Cuatro S.A.	Lepant, 350, 3 <sup>o</sup> , 08025 Barcelona, Spain	None	Technical Advisor
Virtual Engineering & Construction (VEC)	388 Market St. Suite 1300 San Francisco, CA 94110	SBE	BIM/Digital Delivery Support
VSCE, Inc.	1610 Harrison Street, Suite E West Oakland, CA 94612	DBE/SBE	General Engineering Services
Walker Consultants	601 California Street, Suite 820 San Francisco, CA 94108	None	PE/Design for Parking Garages
Wilson Ihrig	6001 Shellmound Street Suite 400 Emeryville, CA 94608	SBE	Acoustics, Noise and Vibration
WriteRight Technical Communications	3511 West 10th Avenue, Vancouver, British Columbia, Canada, V6R 2E9	None	Technical Writing/Specifications
YEI Engineers, Inc.	7677 Oakport Street, Suite 200 Oakland, CA 94621	DBE/SBE	M&P Engineering Services
Dr. Youssef Hashash	1803 Golfview Drive Urbana, Illinois 61801	None	Geotechnical Advisor
Budlong Inc.	44853 Fremont Blvd. Fremont, CA 94538	DBE	M&P Engineering Services





CONTRACT S23174 Construction Management Services – Bechtel Infrastructure Corporation  
List of SUBCONTRACTORS

<b>Firm Name and Location</b>	<b>Area of expertise</b>	<b>DBE</b>
Bechtel Infrastructure Corporation 707 Wilshire Blvd., Suite 3088 Los Angeles, CA 90017	Program Management, Construction Management	
Sener Engineering and Systems Inc. 800 Wilshire Blvd., Suite 700 Los Angeles CA 90017	Inspection, Systems Constructability, TBM and Large Bore Tunnel specialist	
The Allen Group, LLC 50 Osgood Place, Suite 320 San Francisco, CA 94133	DBE/Workforce Development, Utilities Coordination, Community Outreach, Project Administration	
The Kleinfelder Group, Inc 25 Metro Drive Suite 110 San Jose, CA 95110	Claims, Geotechnical Site & Instrumentation, Materials Testing & Inspection, Specialty Track Inspection	
Mueser Rutledge Consulting Engineers 14 Penn Plaza, 225 W 34 <sup>th</sup> St New York, NY 10122	Ground Settlement & Compensation Grouting, Ground Freezing	
Montez Group 249 Onondaga Ave San Francisco, CA 94112	Quality Assurance/Quality Control, Scheduling, Document Control	<b>Yes</b>
Conerstone Concilium 241 Fifth Street San Francisco, CA 94103	Tunnel Inspection	<b>Yes</b>
Dabri, Inc 850 S Van Ness Ave San Francisco, CA 94110	Electrical Inspection, Environmental Compliance	<b>Yes</b>
Acumen Building Enterprises, Inc. 7770 Pardee Lane, Suite 200 Oakland, CA 94621	Survey Coordination, Labor Compliance	<b>Yes</b>
Josephine's Professional Staffing, Inc. 2158 Ringwood Ave San Jose, CA 95131	Requirements Administration, Project Administration	<b>Yes</b>
Safework CM 800 Wilshire Blvd, Suite 1525 Los Angeles, CA 90017	Tunnel Safety	<b>Yes</b>
Morgner Technology Management 1880 Century Park East, Suite 1402 Los Angeles, CA 90067	Environmental Compliance, Tunnel Inspection	<b>Yes</b>
Saylor Consulting Group, Inc. 505 Montgomery Street, 11 <sup>th</sup> Floor. San Francisco, CA 94111	Project Controls	<b>Yes</b>



Pro-Tec Safety Consultants, Inc. 249 Onondaga Ave San Francisco, CA 94112	Construction Safety	<b>Yes</b>
Elle Consultants 1536 Barcelona Drive, Suite 100 El Dorado Hills, CA 95762	Project Controls	<b>Yes</b>
360 Total Concepts 7677 Oakport Street, Suite 230 Oakland, CA 96621	Third-Party Agreements	<b>Yes</b>

**Contract V20210**

**VTA's BART Silicon Valley Phase II Extension: Contract Package 2 – Tunnel and Trackwork**

**KST Joint Venture**

**List of Prime Contractors and Key Subcontractors**

**Prime Contractors:**

FIRM	ADDRESS	AREA OF RESPONSIBILITY
Kiewit Infrastructure West Co.	4650 Business Center Drive, Fairfield, CA 94534	Design-Builder
J.F. Shea Construction, Inc.	667 Brea Canyon Rd, Suite 30, Walnut, CA 92789	Design Builder
Traylor Bros., Inc..	835 N. Congress Ave., Evansville, IN 47715	Design Builder

**Construction Subcontractors:**

FIRM	AREA OF RESPONSIBILITY
Malcolm Drilling Company, Inc.	Slurry Walls West Portal (Partial) West Retaining Cut - Stockton Avenue Mid Tunnel Facility (Partial)
Keller North America, Inc.	Ground Improvement Downtown San Jose Station Headhouse (Partial) Downtown San Jose Station – 2nd Entrance (Partial) Downtown San Jose Station – East Vent & Egress (Partial) Diridon Station Headhouse (Partial) White Street Egress Structure (Partial) Autumn Street Egress Structure (Partial)
Kiewit Foundations Co.	Foundations West Portal (Partial) West Retaining Cut- Stockton Avenue Mid Tunnel Facility (Partial) Downtown San Jose Station Headhouse (Partial) Downtown San Jose Station – 2nd Entrance (Partial) Downtown San Jose Station – East Vent & Egress (Partial) Diridon Station Headhouse (Partial) White Street Egress Structure (Partial) Autumn Street Egress Structure (Partial)
Cupertino Electric, Inc.	Temporary Electrical Services Electrical Design Services Permanent Electrical Work
Mass. Electric Construction Company	Temporary Electrical Services Electrical Design Services Permanent Electrical Work
Herrenknecht Tunnelling Systems USA, Inc.	EWP 9
Team North Construction Services	EWP 3A Street Sweeper
Morgner Technology Management	EWP 7A Instrumentation & Monitoring
A1 Trucking SVS Inc	EWP 3A Water Truck and Offhaul Trucking
Discount Waste Inc	EWP 3A General Waste Disposal
Onsite Health & Safety	EWP 3A Onsite Nurse/EMT
Construction Testing Services Inc	EWP 3A Quality Control

<b>FIRM</b>	<b>AREA OF RESPONSIBILITY</b>
I Cerberus Security & Patrol	EWP 3A Security Guard
Golden Bay Fence Plus Iron Works	EWP 3A Temporary Fencing
Kroner Environmental Services Inc	EWP 3A Noise & Vibration Monitoring
RailPros Field Services Inc	EWP 3A/7A Railroad Flaggers
Earth Safety Dynamics Inc	EWP 3A CIH & Air Monitoring
Service Connected Inc.	EWP 3A Portable Toilets
DirtMarket LLC	EWP 3A Offhaul Trucking and Aggregates
Vulcan Industries, Inc.	EWP 3A Aggregates
National Railroad Safety Services	EWP 3A/7A Railroad Flaggers
Granite Rock Company	EWP 3A AC Paving and Lime Treatment
Sixense Inc	EWP 7A Satellite Ground Motion
Giron Construction	EWP 3A Structural Fill
St Francis Electric	EWP 3A Power Pole Demo
Hammer Head Protection Inc	DLTR Security Guards
Behrens & Associates Inc	EWP 3C Sound Wall
Towill, Inc.	Survey

**Design Subcontractors:**

<b>FIRM</b>	<b>AREA OF RESPONSIBILITY</b>
Kiewit Infrastructure Engineering	Design Management and Discipline Engineering
ARUP	Tunnel and Underground Design including EWP 1 & 2
Shannon Wilson	Geotechnical
JMA Civil, Inc	EWP 3
RSE Corporation	EWP 5
Viatechnik LLC	BIM/CAD Support
Brierley Associates Corporation	Support of Excavation
Bender Consulting LLC	Dewatering
Ground Control Inc	Building Demolition Support
Dr Sauer & Partners Corp	Geotechnical Engineering – Peer Review
HB+Assoc. Architects, Inc.	Architecture
Telamon Engineering Consultants	Utilities Relocation Engineering / Support

FIRM	AREA OF RESPONSIBILITY
OLMM Consulting Engineers	Structures Engineering
PB&A Inc	Geotechnical Engineering – Peer Review
M-P Consultants, PC	Interface Staff Augmentation
Ground Rules Engineering Inc.	GBR Review
DC Engineering Group	Traffic Control Planning (MOT)
NBA Engineering, Inc.	MEP Design
WaterVation, PLLC	Drainage Design Support
Structus Inc	Structural Engineering