



March 8, 2021

**AFFILIATED AGENCIES**

*Orange County  
Transit District*

*Local Transportation  
Authority*

*Service Authority for  
Freeway Emergencies*

*Consolidated Transportation  
Service Agency*

*Congestion Management  
Agency*

*Service Authority for  
Abandoned Vehicles*

**SUBJECT: Request for Proposals (RFP) 1-3361  
“M2 Performance Assessment”**

Gentlemen/Ladies:

This letter shall serve as Addendum No. 2 to the above RFP issued by the Orange County Transportation Authority (Authority). Offerors are reminded that the proposal submittal date is at or before **2:00 p.m., April 13, 2021**.

A pre-proposal conference will be held on March 10, 2021 at 11:00 a.m. **VIA TELECONFERENCE ONLY. The specific call-in number for this conference is 1 (714) 558-5200 Conference ID: 6899016.** The presentation is presented as Attachment A to this Addendum No. 2.

Offerors are reminded to acknowledge receipt of this Addendum No. 2 in their transmittal letter and Exhibit B, “Price Summary Sheet.” All changes addressed in this Addendum No. 2 shall be incorporated into the final Agreement.

Questions regarding this Addendum No. 2 should be directed to the undersigned at [aperez@octa.net](mailto:aperez@octa.net).

Sincerely,

Agueda Perez  
Contract Administrator  
Contracts Administration and Materials Management

## Pre-Proposal Conference for RFP 1-3361: M2 Performance Assessment



Orange County  
Transportation Authority 

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## Agenda

- Introductions / Opening Statement
- Purpose of Pre-Proposal Conference
- Review of RFP Documents
- Review of the Scope of Work
- Questions and Answers
- Closing



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## CAMM NET Registration

### Why register on CAMM NET?

<https://cammnet.octa.net/>

- To receive e-mail notifications of Solicitations, Addenda, and Awards
- View and update your vendor profile
- Required for Award

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## Online Business & Networking Tools

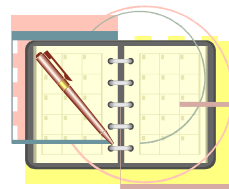
- CAMM NET Connect
  - <https://www.facebook.com/CammnetConnect>
- Working with OCTA
  - <https://cammnet.octa.net/about-us/working/>
- Planholder's List
  - <https://cammnet.octa.net/procurements/planholders-list-selection/>

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## Key Procurement Dates

- Written Questions Due: March 16, 2021
- OCTA Responds: March 26, 2021
- Proposals Due: April 13, 2021 2:00 p.m.
- Interview: May 4, 2021



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## Key Procurement Information

- Next Addendum will contain a copy of the Pre-Proposal sign-in sheet.
- Award based on prime-sub relationship, not joint ventures.

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## Guidelines for Written Questions

- Questions must be submitted directly to Agueda Perez, Contract Administrator, in writing, prior to established due dates.
- E-mail recommended: [aperez@octa.net](mailto:aperez@octa.net)
- Any changes Authority makes to procurement documents will be by written Addenda only.
- Addenda will be issued via CAMM NET.
- Verbal discussions today are non-binding.

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Next...  
Proposal Instructions

Then...  
Review of Scope of Work

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## Proposal Submittal Instructions

(Refer to RFP Section I, p. 4)

- Proposals are due by 2:00 p.m. on the date specified in the RFP.
- Technical proposals are to be submitted electronically as specified in the RFP.
- **\*PLEASE NOTE: Hard copy proposal submission will not be accepted for this RFP. Proposals must be submitted electronically at the link stated in the RFP.**

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## Proposal Submittal Instructions (continued)

(Refer to RFP Section I, pp. 4- 5)

- Authority has the right to:
  - accept or reject any and all proposals;
  - withdraw or cancel the RFP;
  - postpone proposal opening for its own convenience.
- Proposals received are considered public information.
- Proposals are not to be copyrighted.

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## Proposal Submittal Instructions (continued)

(Refer to RFP Section I, p. 6)

- Contract type is firm-fixed
- Conflict of interest
- Code of conduct

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## Proposal Content

(Refer to RFP Section II, pp. 8-11)

- Letter of Transmittal
- Technical Proposal
  - a) Qualifications, related experience, and references of Offeror
  - b) Proposed staffing and project organization
  - c) Work plan
  - d) Exceptions / Deviations (Technical vs. Contractual)

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## Proposal Content (continued)

- Cost and Price Proposal – Exhibit B
  - Offeror shall submit proposed pricing to provide services described in Exhibit A, Scope of Work

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## Proposal Content (continued)

(refer to RFP Section III, pp 25 & 29)

- Forms
  - Status of Past and Present Contracts Form – Exhibit D
  - Proposal Exceptions and/or Deviations Form – Exhibit F

*Note: Forms excluded from 50-page proposal limit.*

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## Evaluation and Award

(Refer to RFP Section III, p. 16)

- All proposals, timely received, will be evaluated using the following evaluation criteria:

Qualifications of the firm	25%
Staffing and project organization	25%
Work plan	30%
Cost and price	20%

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## Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interview.
- Interviews are scheduled for May 4, 2021. Offerors are requested to keep this date available.

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## Award

- Award Process
  - Evaluation Committee will select highest ranking Offeror for award.
  - All firms submitting a proposal will be notified of Award via CAMM NET.

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## Proposed Agreement

- Proposed Agreement
  - Please review the Proposed Agreement so you are aware of the contractual requirements of this project
- Exceptions/Deviations
  - Any exceptions and/or deviations must be identified in Exhibit F, Proposal Exceptions and/or Deviations form



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## Proposed Agreement (continued)

- Offerors are encouraged to review:
  - Article 4 – Term of Agreement (one-year term)
  - Article 5 – Payment (firm-fixed)
  - Article 6 – Maximum Obligation
  - Article 9 – Insurance

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## Scope of Work

(Refer to RFP Exhibit A)

Francesca Ching  
Project Manager

Project Overview and Scope of Work

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## Scope of Work

### Areas of Review (including, but not limited to):

- **Project Delivery**  
Evaluate OCTA's effectiveness and efficiency in developing and implementing the projects and programs in M2.
- **Program Management / Responsiveness**  
Evaluate OCTA's approach to program management.
- **Compliance**  
Evaluate OCTA's approach to ensuring compliance with the Ordinance.
- **Fiscal Responsibility**  
Evaluate the extent to which OCTA is economical in structuring the approach to project and program delivery.
- **Transparency and Accountability**  
Evaluate how fully, intelligibly, and otherwise appropriate OCTA reports on M2 matters to the Board, the TOC, the general public and other stakeholders.

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- Questions?



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- Reminder.... Proposals are due @ 2:00 p.m. on April 13, 2021.
- Please register on CAMM NET.
- Thank you for your interest in OCTA!