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CHIEF EXECUTIVE OFFICE

Darrell E. Johnson  
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June 28, 2021

**SUBJECT: Request for Proposals (RFP) 1-3489 "On-Call Construction Management Services for LOSSAN Agency"**

Gentlemen/Ladies:

This letter and its Attachments comprise **Addendum No. 1** to the above captioned Request for Proposals issued by the Orange County Transportation Authority (OCTA) on behalf of the Los Angeles-San Diego-San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency).

1. Offerors are advised that the pre-proposal conference will be held on June 30, 2021 at 9:00 a.m., attendance will be via call-in only for non-agency participants. Prospective offerors may call-in using the following credentials:
  - Call-in number: 714-560-5666
  - Conference ID: 236238
2. Offerors are advised that a copy of the pre-proposal conference presentation is presented as Attachment A to this Addendum No. 1.
3. Offerors who attend the pre-proposal conference remotely must by, no later than Wednesday, June 30, 2021 at 9:00 a.m., fill out and email to [igreen@octa.net](mailto:igreen@octa.net) the Pre-Proposal Conference Registration sheet presented as Attachment B to this Addendum No. 1.

Offerors are reminded to acknowledge receipt of this **Addendum No. 1** in their Letter of Transmittal, which is to accompany the proposal. Offerors are advised that all changes addressed in this **Addendum No. 1** shall be incorporated into the final Agreement.

Questions regarding this **Addendum No. 1** should be directed to the undersigned at 714-560-5317.

Sincerely,

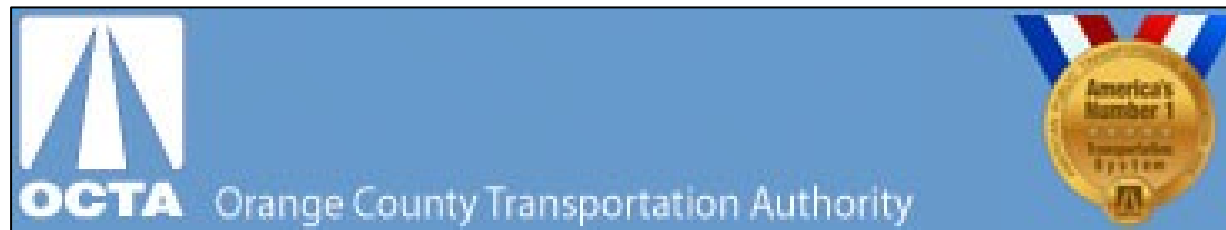
*Irene Green*

Irene Green  
Senior Contract Administrator  
Contracts Administration and Materials Management

**Attachments:**

Attachment A: Pre-Proposal Conference PowerPoint Presentation  
Attachment B: Pre-Proposal Conference Registration

# Pre-Proposal Conference for RFP 1-3489: Construction Management Services for LOSSAN Agency



# Agenda

- Introductions
- Online Business and Networking Tools
- Key Procurement Information & Dates
- Review of RFP Documents
- Scope of Work
- Questions and Answer



# CAMM NET Registration

Why register on CAMM NET?

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

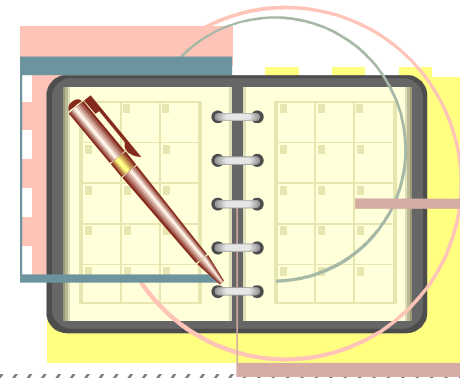
- To receive e-mail notifications of Solicitations, Addenda and Awards
- View and update your vendor profile
- Required for Award

# 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/>

# Key Procurement Dates

|                        |                        |
|------------------------|------------------------|
| Written Questions Due: | July 1, 2021           |
| OCTA Responds:         | July 8, 2021           |
| Proposals Due:         | July 20, 2021, 2:00 PM |
| Interviews:            | August 10, 2021        |
| Board of Directors:    | September 20, 2021     |



# Key Procurement Information

- All questions/contact with LOSSAN/Authority staff should be directed to the assigned Contract Administrator, Irene Green.
- Next Addendum will contain a copy of the completed Pre-Proposal registration sheets.
- Award based on prime-sub relationship, not joint ventures
- Contract term is for 5 years; with an option term of 2 years.

# Guidelines for Written Questions

- Questions must be submitted directly to Irene Green, Senior Contract Administrator, via e-mail, by: **July 1, 2021, 5:00 p.m.**
- E-mail recommended: [igreen@octa.net](mailto:igreen@octa.net)
- Any changes Authority makes to procurement documents will be by written Addenda only
- Addenda will be issued via CAMM NET
- Today's Verbal discussions today are non-binding



Next...  
Proposal Instructions

Followed by...  
Review of Scope of Work

# Proposal Submittal Instructions

- Proposals are due by 2:00 p.m., July 20, 2021
- 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 by the date and time as indicated above.**

# Proposal Submittal Instructions (continued)

- 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

# Proposal Content

- 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)

# Proposal Content (continued)

## Cost and Price Proposal

- Only technical qualifications are to be submitted at this time
- No cost/price information is to be submitted
- Only highest ranked Offeror will be asked to submit a detailed cost proposal
  - Negotiations will commence based on both the cost and technical proposals

# Proposal Content (continued)

## **Forms:**

- Exhibit C – Status of Past and Present Contracts
- Exhibit D – Campaign Contributions Disclosure Form
- Exhibit E – Level 3 Safety Specifications (not submitted with proposal)
- Exhibit F – Proposal Exceptions and/or Deviations

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

# Evaluation and Award

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

|                                   |     |
|-----------------------------------|-----|
| Qualifications of the firm        | 25% |
| Staffing and project organization | 40% |
| Work plan                         | 35% |

- Evaluation Committee comprised of internal LOSSAN/OCTA staff

# Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interview
- Interviews are scheduled for **August 10, 2021**
- Offerors are requested to keep this date available



# Award

- Award Process

- Evaluation Committee recommends highest ranking Offeror to the LOSSAN Board of Directors (LOSSAN BOD)
- LOSSAN BOD may accept/reject staff's recommendation
- All firms submitting a proposal will be notified of Award via CAMM NET

# Proposed Agreement

- Proposed Agreement
  - Please review the Proposed Agreement (Exhibit B) so you are aware of the contractual requirements of the solicitation
  - Please carefully review all language regarding PMC and construction related prohibitions (Article 45)
- Exceptions
  - Any exceptions/deviations must be identified in Exhibit F – Proposal Exceptions and/or Deviations Form and submitted with the proposal.



# Proposed Agreement

- Offerors are encouraged to review:
  - Article 3 - Scope of Work
  - Article 4 - Term of Agreement
  - Article 5 - Payment (Time and Expense)
  - Article 7- Maximum Obligation
  - Article 10 - Insurance
  - Article 19 - Code of Conduct
  - Article 45 - Prohibition

# CONSTRUCTION MANAGEMENT SERVICES

## Scope of Work (Refer to RFP Exhibit A)



## Program Overview and Scope of Work

**ROGER LOPEZ**

LOSSAN Manager, Planning & Analysis





## BACKGROUND

### LOSSAN Rail Corridor Agency

- Joint Powers Authority comprised of 9 member agencies
- Responsible for management and administration of Amtrak's Pacific Surfliner service
- Includes operations of service and maintenance of equipment
- Operates over 351 miles between San Luis Obispo and San Diego
- Coordinates with host railroads, including SCRRA, NCTD, UPRR and BNSF on service and infrastructure changes and improvements



## UPCOMING PROJECTS

| PROJECT                                                                              | ESTIMATED COST         |
|--------------------------------------------------------------------------------------|------------------------|
| Central Coast Layover Facility (Phase 1)                                             | \$26.2 million         |
| Interim San Luis Obispo Layover Facility Expansion                                   | \$1.6 million          |
| Centralized Traffic Control / Powered Sidings Upgrade                                | \$29.2 million         |
| Bridge Replacements / Infrastructure Enhancements                                    | \$86 million           |
| Santa Barbara Subdivision Corridor Hardening Improvements / Safety Improvements      | \$9.4 million          |
| Goleta Layover Facility Expansion                                                    | \$10.1 million         |
| Carpinteria Second Track and Platform                                                | \$42 million           |
| Oxnard to Leesdale Second Track and Platform                                         | \$46.9 million         |
| Seacliff Siding Extension                                                            | \$20.5 million         |
| Various Corridor Optimization, Passenger Amenity Upgrades, and Facility Improvements | \$3.8 million          |
| San Diego County Maintenance and Layover Facility (Phase 1)                          | \$28.4 million         |
| <b>TOTAL COST</b>                                                                    | <b>\$304.1 million</b> |

## CURRENT PROJECTS UNDERWAY

| PROJECT                                               | PHASE                                          |
|-------------------------------------------------------|------------------------------------------------|
| Centralized Traffic Control / Powered Sidings Upgrade | Construction                                   |
| Goleta Layover Facility Expansion                     | Design                                         |
| Bridge Replacements / Infrastructure Enhancements     | Design/Construction                            |
| Central Coast Layover Facility                        | Project Approval / Environmental Documentation |
| Interim San Luis Obispo Layover Facility Expansion    | Design                                         |
| San Diego County Maintenance and Layover Facility     | Project Approval / Environmental Documentation |



## CURRENT AND POTENTIAL FUNDING SOURCES

- Current funding is provided through LOSSAN administrative funds, awarded grant and programmed state funds
- Additional funding will be sought from federal sources through future Federal Railroad Administration grant opportunities
- Contract must maintain compliance with funding requirements through life cycle



## CONSTRUCTION MANAGEMENT SERVICES – GENERAL

- **Preconstruction**
  - PreBid/Bidding
  - Partnering
  - Construction
- **Contract Administration**
  - Schedule Administration
  - Control of Material, Measurement and Payment
  - Manage, Track and Control Changes to the Contract
  - Stop Notices, Disputes and Potential Claims
- Control of Field and Shop Work, Testing and Inspection
- Safety, Security and Emergencies
- Insurance, Labor Compliance and Disadvantaged Business Enterprise
- Interface with Utilities and External Agencies
- Public Outreach and Community Services
- **Post Construction**
  - Contract Completion, Acceptance, Closeout and Final Payment

## LOSSAN AGENCY EXPECTATIONS

- Key staff have experience and technical background providing construction management services on commuter, intercity and freight rail projects
- Consultant team should be capable of providing technical services in all disciplines throughout the entire LOSSAN Corridor
- Consultant team should have the capacity to perform for the duration of the contract
- Assist LOSSAN to deliver projects on time and on budget and in compliance with all internal / external requirements
- Perform all work safely

- Questions?



- Reminder.... Proposals are due @ 2:00 pm on July 20, 2021.
- Please submit the completed 'Pre-Proposal Registration' sheet to [igreen@octa.net](mailto:igreen@octa.net) if you have not done so already
- Please register on CAMM NET
- Thank you for your interest!



**PRE-BID CONFERENCE REGISTRATION**  
**IFB #: 1-3489    Date: JUNE 30, 2021**  
**Title: ON-CALL CONSTRUCTION MANAGEMENT SERVICES FOR**  
**LOSSAN AGENCY**

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1.    **Company Name:** \_\_\_\_\_  
**Attendee:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**City, State Zip:** \_\_\_\_\_  
**Phone Number:** (        ) \_\_\_\_\_    **Registered on CAMM NET?**    ☐ Yes    ☐ No  
**Prime** ☐ **Sub** ☐ **DBE** ☐  
**E-Mail Address:** \_\_\_\_\_

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2.    **Company Name:** \_\_\_\_\_  
**Attendee:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**City, State Zip:** \_\_\_\_\_  
**Phone Number:** (        ) \_\_\_\_\_    **Registered on CAMM NET?**    ☐ Yes    ☐ No  
**Prime** ☐ **Sub** ☐ **DBE** ☐  
**E-Mail Address:** \_\_\_\_\_

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3.    **Company Name:** \_\_\_\_\_  
**Attendee:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**City, State Zip:** \_\_\_\_\_  
**Phone Number:** (        ) \_\_\_\_\_    **Registered on CAMM NET?**    ☐ Yes    ☐ No  
**Prime** ☐ **Sub** ☐ **DBE** ☐  
**E-Mail Address:** \_\_\_\_\_