



September 2, 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) 1-3653  
“Transit Asset Management Plan Update”**

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., September 29, 2021**.

A pre-proposal conference was conducted via teleconference on August 26, 2021. The pre-proposal registration sheets are presented as Attachment A.

Offerors are advised that Exhibit A, “Scope of Work” has been revised and is presented as Attachment B to this Addendum No. 2. The Scope of Work has been revised to include additional items as highlighted.

The following questions were submitted by the deadline:

1. Q – Who provided consultancy for the current TAM Plan developed in 2018?

A – Jacobs Civil, Inc.

2. Q – Would you be providing a current asset inventory prior to the submission or after award?

A – Refer to Section 1 of the RFP for a general description of OCTA assets. With respect to the sixty-seven (67) facilities, the number of assets associated with those facilities will be larger. The official asset inventory will be furnished to the successful proposer.

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 [dherrera@octa.net](mailto:dherrera@octa.net).

Sincerely,

A handwritten signature in black ink that reads "Donald Herrera". The script is cursive and fluid, with the first name and last name clearly distinguishable.

Donald Herrera  
Contract Administrator  
Contracts Administration and Materials Management



## PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3653

Date: Thursday, August 26, 2021

Title: Transit Asset Management Plan Update

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1. Company Name: Marine Tiger Technologies Corporation  
Attendee: Marcia S. Shapiro  
Address: 547 Northumberland Road  
City, State Zip: Teaneck, New Jersey 07666  
Phone Number: ( 201 ) -692-3938 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☐ Sub ☒  
E-Mail Address:   
mshapiro@marinetiger.com
- 
2. Company Name: Marine Tiger Technologies Corporation  
Attendee: William Van Zilen  
Address: 547 Northumberland Road  
City, State Zip: Teaneck, New Jersey 07666  
Phone Number: ( 201 ) -692-3938 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☐ Sub ☒  
E-Mail Address:   
wvanzilen@marinetiger.com
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3. Company Name: \_\_\_\_\_  
Attendee: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State Zip: \_\_\_\_\_  
Phone Number: (       ) Registered on CAMM NET? ☐ Yes ☐ No  
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## PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3653

Date: Thursday, August 26, 2021

Title: Transit Asset Management Plan Update

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1. **Company Name:** Capitol Government Contract Specialists

**Attendee:** Tom Talarico

**Address:** 4199 Campus Drive, Suite 550

**City, State Zip:** Irvine, CA 92612

**Phone Number:** ( 949 ) 725-2208 **Registered on CAMM NET?** ☒ Yes ☐ No

**Prime** ☒ **Sub** ☒

**E-Mail Address:** t t a l a r i c o @ c a p g c s . c o m

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2. **Company Name:** \_\_\_\_\_

**Attendee:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City, State Zip:** \_\_\_\_\_

**Phone Number:** ( ) \_\_\_\_\_ **Registered on CAMM NET?** ☐ Yes ☐ No

**Prime** ☐ **Sub** ☐

**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** ☐

**E-Mail Address:** \_\_\_\_\_



## PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3653

Date: Thursday, August 26, 2021

Title: Transit Asset Management Plan Update

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1. Company Name: Four-season Travel, LLC  
Attendee: Joanne Wong  
Address: 13139 Ramona Blvd, Unit E  
City, State Zip: Irwindale, CA 91706  
Phone Number: ( 626 ) 228-3131 Ext 1006 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☒ Sub ☐  
E-Mail Address: 

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2. Company Name: Four-season Travel, LLC  
Attendee: Nathan Chen  
Address: 13139 Ramona Blvd, Unit E  
City, State Zip: Irwindale, CA 91706  
Phone Number: ( 626 ) 228-3131 Ext 1002 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☒ Sub ☐  
E-Mail Address: 

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Attendee: \_\_\_\_\_  
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## PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3653

Date: Thursday, August 26, 2021

Title: Transit Asset Management Plan Update

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1. Company Name: Cambridge Systematics, Inc.  
Attendee: Satyen Patel  
Address: 101 Station Landing , Suite 410  
City, State Zip: Medford , MA 02155  
Phone Number: ( 857 ) 366 2038 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☒ Sub ☐  
E-Mail Address: 

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## PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3653

Date: Thursday, August 26, 2021

Title: Transit Asset Management Plan Update

1. Company Name: DAVID EVANS AND ASSOCIATES  
Attendee: STEVEN ANDERSON  
Address: 17782 17th ST, SUITE 200  
City, State Zip: TUSTIN, CA 92780  
Phone Number: ( 775 ) 530-2083 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☐ Sub ☒  
E-Mail Address: steven.anderson@deainc.com  
☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

2. Company Name: \_\_\_\_\_  
Attendee: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State Zip: \_\_\_\_\_  
Phone Number: (       ) Registered on CAMM NET? ☐ Yes ☐ No  
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## PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3653

Date: Thursday, August 26, 2021

Title: Transit Asset Management Plan Update

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1. Company Name: KIRLEY - HOAN & ASSOC  
Attendee: YONER GRANT  
Address: 10 Almaden Blvd Ste 1250  
City, State Zip: San Jose CA 95113  
Phone Number: (669) 800-1984 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☒ Sub ☐  
E-Mail Address: y o n e r . g r a n t @ k i r l e y - h o a n . c o m
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2. Company Name: \_\_\_\_\_  
Attendee: \_\_\_\_\_  
Address: \_\_\_\_\_  
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Attendee: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State Zip: \_\_\_\_\_  
Phone Number: ( ) \_\_\_\_\_ Registered on CAMM NET? ☐ Yes ☐ No  
Prime ☐ Sub ☐  
E-Mail Address:



**REVISED SCOPE OF WORK****OCTA TRANSIT ASSET MANAGEMENT PLAN UPDATE****SECTION 1 – GENERAL**

The Orange County Transportation Authority (OCTA) serves as the multi-modal transportation agency and provides many of the public transit services for Orange County, CA. Under the Federal Transit Administration (FTA) Transit Asset Management (TAM) Final Rule [49 CFR 625], all recipients and sub-recipients of federal funds under 49 USC Chapter 53 that own, operate, or manage capital assets used for providing public transportation must develop and implement TAM Plans. The plans must include an asset inventory and condition assessment, description of a decision support tool, and a prioritized list of investments to support the State of Good Repair (SGR) of the agency's capital assets.

OCTA developed a TAM Plan in 2018 and seeks consultant services to prepare the 2022 TAM Plan update in accordance with the FTA TAM Final Rule. OCTA tracks inventoried assets and monitors the SGR through various functions and divisions. The TAM Plan shall help document existing practices and identify new procedures, where needed, to best meet OCTA's TAM objectives.

- OCTA wishes to engage the services of a qualified consultant (Consultant) to update the agency's existing TAM Plan and satisfy all applicable requirements of the FTA TAM Final Rule (49 CFR Parts 625 and 630).
- OCTA oversees transit operations for seven hundred ninety-eight (798) square-mile area which includes thirty-four (34) cities and three (3) million residents. The agency operates fifty-eight (58) fixed bus routes which include local lines, community lines, inter/intracounty express lines, limited-stop lines, and StationLink rail feeder lines; and operates paratransit services. OCTA uses five hundred eight (508) vehicles for fixed route service and two hundred forty-six (246) vehicles for paratransit services; and employs one hundred fifty-two (152) non-revenue vehicles to support maintenance and administrative functions. The OC Streetcar, OCTA's first rail project, is currently under construction and is anticipated to open for revenue operations in late 2023.
- OCTA owns, operates, and maintains five (5) maintenance and operating bus bases, one (1) park and ride facility, and six (6) transportation centers. The facilities are comprised of sixty-seven (67) buildings and structures totaling over 400,000 square feet. The structures are situated on approximately eighty-nine (89) acres located throughout Orange County. A separate RFP will be issued for the preparation of facility condition assessments. The results of these condition assessments shall be provided to the Consultant for incorporation into the TAM Plan.

## **SECTION 2 – GENERAL PROVISIONS**

### **2.1. Work Performance, Coordination and Schedule**

A preliminary schedule shall be submitted to OCTA for review and acceptance within five (5) working days after the Notice to Proceed (NTP). OCTA will require five (5) working days to review. Within fifteen (15) working days after the NTP, a final schedule shall be submitted to OCTA for acceptance. Upon acceptance, this schedule shall be designated the Project Baseline Schedule, from which contract progress shall be tracked. Monthly periodic updates of the schedule to show progress shall be submitted. (The Proposed Schedule included in Section 5 of this Scope of Work is provided as guidance. The Consultant may refine/revise this as is necessary.)

Consultant shall commence work immediately upon receiving the NTP. Consultant shall use diligence in completing the work in accordance with the schedule. In case of conflict, ambiguities, discrepancies, errors, or omissions among any of the items of work, Consultant shall submit the matters to OCTA for clarification. Any work affected by such conflicts, ambiguities, discrepancies, errors or omissions which is performed by the Consultant prior to clarification by OCTA shall be at Consultant's risk. Such conflicts, ambiguities, discrepancies, errors, or omissions among the references shall not give rise to a claim by Consultant for extra work unless Consultant can demonstrate that it has incurred additional expenses as a result thereof.

## **SECTION 3 - CONSULTANT RESPONSIBILITIES**

### **Task 1: Administration and Management**

The Consultant Project Manager shall manage and oversee all aspects of the Consultant's work. Included in this task will be project meetings required to complete the TAM Plan. The Consultant shall include an initial kickoff meeting with OCTA staff from the Transit, Planning, Capital Programs, Finance and Administration divisions to discuss the approach to the project, key delivery dates, coordination with OCTA staff, and project objectives. In addition, the Consultant shall include one (1) meeting per month over the term of this contract to report the status of the project, work efforts, progress, and schedule to the OCTA Project Manager. The Consultant shall assume a total of ten (10) monthly meetings.

#### **A. Monthly Coordination Meetings**

Consultant shall furnish and distribute meeting minutes within one (1) week of the meetings to the project team. Meeting minutes shall include completed items, items in progress, upcoming items, changes, and budget impacts. Consultant is also expected to make action item checklists and other pertinent documentation to successfully manage the project. Consultant shall notify the OCTA Project

Manager immediately of any problem(s), which may impact either the project's schedule or budget.

**B. Management Workshops**

Consultant shall conduct two (2) management workshops to educate OCTA executive management about the TAM Plan and to solicit input on policy. These will be sixty (60) to ninety (90)-minute meetings which will be held remotely until further notice from OCTA's Project Manager and shall be conducted in a workshop manner with exercises and group exercises to develop consensus. The following minimum workshops must be conducted:

- Workshop 1: Brief Overview of TAM rulemaking and recent FTA Guidance; presentation of initial assessment of OCTA practices; presentation of assumptions from the 2018 TAM Plan (e.g., Bus useful life, twenty (20)-year fleet outlook, investment prioritization)
- Workshop 2: Presentation of Draft 2022 TAM Plan and Assumptions including:
  - Investment Prioritization
  - Bus Restructuring Study and Zero Emission Bus (ZEB) Rollout Plan, etc.
  - OC Streetcar start-up
  - Facility Condition Assessments
  - Review of draft TAM Plan.

**C. Project Schedule and Tracking**

The Consultant shall develop, maintain, and manage the project schedule. The schedule shall include all activities (by work task, whether performed by the Consultant or by others), start dates, activity durations, project submittal dates, relationships among work tasks (including critical path items), and float time.

**D. Monthly Invoices and Progress Reports**

The Consultant shall submit a monthly progress report and invoice in a format to be approved by the OCTA Project Manager. The report shall be submitted by the 15<sup>th</sup> of each month for the preceding month. The progress narrative shall document progress from the first day of the month through the last day of the month. The monthly progress report shall be submitted in hard copy and electronically both, in a format acceptable to OCTA.

**Task 1 Deliverables:**

- A. Meeting agendas and minutes for each monthly meeting.
- B. Develop agendas for and conduct two (2) management workshops
- C. Project Schedule.
- D. Monthly Invoices and Progress Reports.

**Task 2: Initial Assessment of OCTA Asset Management Practices**

**A. Review of Prior Plans and FTA TAM Guidance**

The Consultant shall review and provide a brief (3-5 page) synthesis of relevant TAM Guidance. The review shall include at a minimum the following documents but not be limited to this list:

- 2018 OCTA TAM Plan
- 2020 OCTA Public Transportation Agency Safety Plan (PTASP)
- FTA TAM Decision Support Tool State of the Practice Synthesis (September 2020)
- FTA TAM Investment Prioritization State of the Practice Synthesis (September 2020)
- FTA Transit Asset Management Systems Handbook (September 2020)
- FTA Asset Management Guide Supplement: Asset Category Overviews and Life Cycle Management (Updated September 2019)
- FTA TAM-PTASP Fact Sheet

**B. Assessment of Current Practices**

Consultant shall perform an initial round of interviews with selected personnel from the Operations, Planning, Capital Programs, and Finance & Administration divisions. Consultant shall assess current practices, roles and responsibilities, and data and systems used to track and assess inventory. Interviews should be conducted within two (2) weeks of the initial kick-off meeting. Based on the interviews and other applicable resources, the Consultant shall prepare an initial assessment of OCTA's current asset management practices, which identifies current roles and responsibilities being performed by various divisions, and the systems currently used track and assess inventory and prepare/prioritize capital investment scenarios.

**Task 2 Deliverables:**

- A. A technical memorandum (3-5 pages) which summarizes the most recent and relevant FTA TAM Guidance and identifies potential considerations for OCTA's TAM plan update and ongoing TAM activities. The technical memorandum shall include a checklist to show compliance with regulatory requirements.

- B. A technical memorandum which outlines current practices, roles and responsibilities, inventories, and decision-making processes used for asset management.

### Task 3: TAM Plan Update

The following sub-tasks comprise the key elements of the TAM Plan. Consultant shall help prepare the key elements as well as help facilitate discussions on how to improve in the areas identified for continued improvement and identified by staff during regular coordination meetings or management workshops. Consultant shall have a working knowledge of the key annual activities outlined in the initial OCTA TAM Plan. For purposes of efficiency, it is recommended that the deliverables be submitted in a format that can easily evolve into a section or chapter of the TAM Plan. A *draft chapter* format is acceptable.

#### A. Inventory of Capital Assets

Consultant shall update the inventory of capital assets. For the 2018 OCTA TAM Plan, OCTA developed a comprehensive inventory of existing bus capital assets, consisting of vehicles, facilities, and systems. The data sources used to populate this inventory included revenue and non-revenue fleet plans, the Comprehensive Business Plan project list, and a fixed asset inventory for system assets. Additionally, the facility condition assessments being completed under a separate RFP will provide a complete inventory of facility assets.

#### B. Condition & Useful Life Assessment of Inventoried Assets

Consultant shall use the inventories from **Task 3.A** to prepare a complete assessment of inventoried assets. The condition assessments shall include sufficient detail to monitor performance and plan capital investments and shall be collected at the individual or asset class level, in accordance with the FTA guidance. The assessments shall apply to those assets that are owned by the transit provider or for which the transit provider has direct capital responsibility. The Consultant will also update the Rolling Stock and Equipment databases based on current age and useful life benchmarks.

For OCTA's TAM Plan there are four (4) applicable asset classes:

1. Rolling Stock – Buses, other passenger cars, railcars
2. Equipment – Maintenance, construction, non-revenue service vehicles
3. Infrastructure – Systems, fixed guideway, power, structures
4. Facilities – Support facilities, passenger facilities, parking facilities (Facility condition assessments will be conducted through a separate scope of work. The results will be made available to the Consultant for incorporation into the TAM Plan.)

**C. Decision Support Tool**

Consultant shall document the analytical process used to estimate capital investment needs over time and to determine prioritization for investments.

The OCTA uses the Comprehensive Business Plan (CBP) and the TAM Plan to identify and prioritize capital improvements, to forecast project costs, and identify funding availability; and to maintain the inventory of existing bus capital assets. The facility condition assessments will establish a comprehensive inventory of the facilities and subsystems and identify a twenty (20)-year list of capital improvements. The Consultant shall use these resources as the basis for the twenty (20)-year list of TAM needs. To date, the agency has applied the FTA Transit Economics Requirements Model (TERM-Lite) to estimate the agency's twenty (20)-year bus capital project needs. The Consultant shall work with staff to achieve consensus across divisions, document prioritization criteria and weights, and make necessary updates to the TERM-Lite model.

Consultant shall help prepare a twenty (20)-Year list of transit capital needs that can be easily reconciled with the agency's CBP list of capital needs and serve as a useful tool during the annual budget process.

**D. Investment Prioritization**

Consultant shall develop a ranked list of proposed projects and programs ordered by year of implementation and shall identify the prioritization determined by local policy and needs. The list must adequately consider unacceptable safety risks, accessibility requirements, and shall be fiscally constrained based on estimated funding levels. The Consultant shall work with staff to develop asset investment scenarios based on OCTA's forecasted revenues. The prioritization workshop described in Task 1. B should be used to solicit input across divisions.

**E. SGR Policy**

Consultant shall assist OCTA in reviewing and updating the SGR policy. The management workshops described in Task 1. B shall be used to inform this policy.

**F. Draft and Final TAM Plan**

Consultant shall prepare a Draft and then a Final TAM Plan which clearly documents the agency's vision, executive-level direction to support the goals of the TAM program, and the OCTA's commitment to achieving a SGR. The Plan shall define the TAM objectives and the assigned roles and responsibilities. The

Draft Plan shall be circulated to all applicable divisions and executive management for review and comment. Comments received shall be incorporated into a final document. The Plan should clarify how it will be integrated with existing SGR policies and practices. The Consultant will develop a PowerPoint presentation suitable for presenting the TAM Plan to the OCTA Board.

**G. Implementation Strategy**

Consultant shall identify and document the operational level process for implementing the TAM Plan. This shall include self-certification of the Plan by the Accountable Executive, and implementation roles for all applicable divisions.

**H. List of Key Annual Activities**

Consultant shall describe and document the actions needed to implement the TAM Plan for each year of the Plan's horizon, including but not limited to the following annual activities and the divisions responsible:

- SGR Performance Targets in National Transit Database (NTD) Report
- Annual Asset Inventory and condition Report
- Annual Narrative Report
- Future TAM Update and Condition Assessment schedules
- State or Metropolitan Planning Organization (MPO) updates

**I. Identification of Resources**

Consultant shall assist staff in identifying the agency resources required to develop the TAM Plan, including staff time, technology requirements, and funding.

**J. Evaluation Plan**

The Consultant shall identify and document how TAM activities will be monitored, evaluated, and updated to ensure the continuous improvement of TAM practices.

**Task 3 Deliverables:**

- A. Comprehensive list of capital assets that can be included in the TAM plan as a set of tables or exhibits.
- B. Clear documentation of the condition of all applicable inventoried assets.
- C. Documentation of investment needs and process for determining prioritization of investments.
- D. List of prioritized projects and programs ordered by year of implementation. Identification of unacceptable safety risks and accessibility requirements.
- E. SGR Policy.
- F. Draft and Final TAM Plan, comment matrix, and PowerPoint presentation.
- G. Clear documentation of the implementation plan.

- H. Clear documentation of key annual activities and divisions responsible for implementation.
- I. List and brief description of staff and resources required.
- J. Clear documentation of how TAM activities will be monitored, evaluated, and updated.

#### **SECTION 4 – OCTA RESPONSIBILITIES**

OCTA will provide a response to information requests within one (1) week.  
OCTA will host all meetings virtually or in-person, as allowed under most current COVID-19 protocols.



## **SECTION 5 – PROPOSED SCHEDULE**

The Consultant shall consider the proposed schedule in developing the Project Schedule described in Task 1.D.

**TAM Plan Schedule**

<b>Task</b>	<b>Deliverable</b>	<b>Due Date</b>
<b>1</b>	<b>Administration and Project Management</b>	
1.A	Monthly Coordination	Monthly
1.B	Management Workshops	TBD
1.C	Project Schedule and Tracking	15 days from NTP*
1.D	Monthly Progress Report and Invoice	Monthly
<b>2</b>	<b>Initial Assessment of OCTA Practices</b>	
2.A	Review of Prior Plans and FTA TAM Guidance	30 days from NTP*
2.B	Assessment of Current Practices	40 days from NTP*
<b>3</b>	<b>TAM Plan Development</b>	
3.A	Inventory of Capital Assets	30 days from NTP*
3.B	Condition Assessment of Inventoried Assets	60 days
3.C	Decision Support Tool	120 days
3.D	Investment Prioritization	150 days
3.E	State of Good Repair Policy	150 days
3.F	Draft TAM Plan	180 days
3.F	Final TAM Plan	240 days
3.G	Implementation Strategy	210 days
3.H	List of Key Annual Activities	210 days
3.I	Identification of Resources	210 days
3.J	Evaluation Plan	210 days

\* NTP = Notice to Proceed

**(END –SCOPE OF WORK)**