



December 22, 2021

NOTICE TO ALL PROPOSERS

*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) 1-3895  
"Climate Adaptability and Sustainability Plan Consultant  
Services"**

Gentlemen/Ladies:

This letter shall serve as Addendum No. 1 to the above RFP issued by the Orange County Transportation Authority (Authority).

Offerors are advised the Authority has changed the weighting of the evaluation criteria and will evaluate the offers received based on the following:

Qualifications of the Firm:	20%
Staffing and Project Organization	30%
Work Plan	30%
Cost	20%

Offerors are advised a pre-proposal conference will be held via teleconference on December 27, 2021, at 9:00 a.m. Prospective Offerors may join or call-in using the following credentials:

- <https://meet.octa.net/ycrowder/9W4EMPV9>
- Or Call-in Number: 714-558-5200
- Conference ID: 153450#

Offerors are advised the pre-proposal registration sheet is presented as Attachment A and the PowerPoint presentation is presented as Attachment B to this Addendum No. 1. Attendees are advised to complete the registration sheet (Attachment A) and email it to the undersigned at [ycrowder@octa.net](mailto:ycrowder@octa.net) at or before 4:30 p.m., January 10, 2021. **Please note that the meeting will no longer be available for in-person attendance.** For additional information, please refer to the subject RFP.

Offerors are reminded that the proposal submittal date is at or before 2:00 p.m., January 24, 2022.

Offerors are reminded to acknowledge receipt of this Addendum No. 1 in their transmittal letter. All changes addressed in this Addendum No. 1 shall be incorporated into the final Agreement.

Yvette Crowder  
Senior Contract Administrator  
Contracts Administration and Materials Management

*Orange County Transportation Authority  
550 South Main Street / P.O. Box 14184 / Orange / California 92863-1584 / (714) 560-OCTA (6282)*

# PRE-PROPOSAL/PRE-BID CONFERENCE REGISTRATION



**OCTA** RFP #: 1-3895

ATTACHMENT A TO ADDENDUM NO. 1

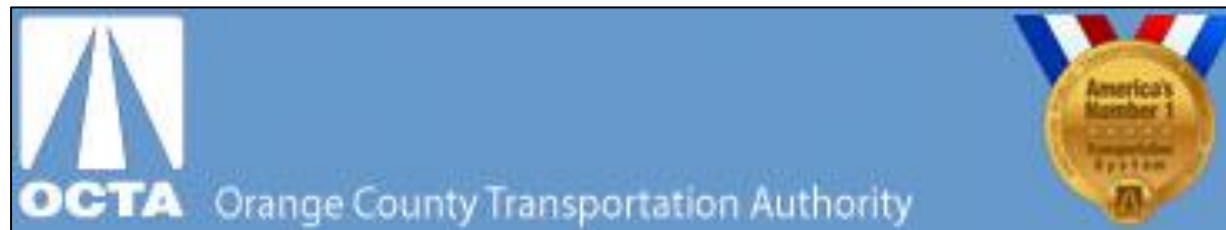
Date: December 27, 2021

Title: Climate Adaptability and Sustainability Plan Consultant Services

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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: \_\_\_\_\_
- : \_\_\_\_\_

# Pre-Proposal Conference for RFP 1-3895: Climate Adaptability and Sustainability Plan Consultant Services



# 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:

January 10, 2022

OCTA Responds:

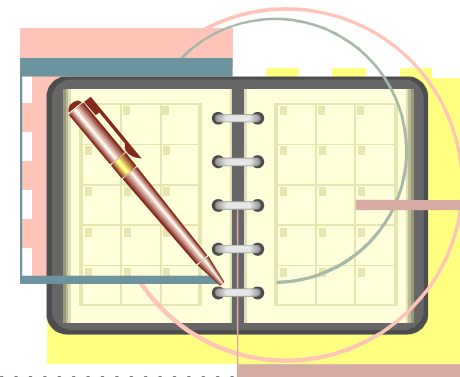
January 11, 2022

Proposals Due:

January 24, 2022, 2:00 PM

Interviews:

February 7, 2022



# Key Procurement Information

- All questions/contact with Authority staff should be directed to the assigned Senior Contract Administrator, Yvette Crowder
- Next Addendum will contain a copy of the Pre-Proposal sign-in sheets
- Award based on prime-sub relationship, not joint ventures
- Contract term is for a two-year term



# Guidelines for Written Questions

- Questions and Pre-proposals Registration forms must be submitted directly to Yvette Crowder, Senior Contract Administrator, in writing, by January 10, 2022, **4:30 p.m.**
- E-mail recommended: [ycrowder@octa.net](mailto:ycrowder@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 must be submitted electronically through the following URL link: <https://www.octa.net/Proposal Upload Link> at or before 2:00 p.m. on January 24, 2022. Select “RFP 1-3895” from the drop-down menu and follow the instructions as prompted.
- Hard copy proposal submission will not be accepted for this RFP. Proposals must be submitted electronically at the link stated above and by the date and time as indicated.

# 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) Cost and Price
  - e) Exceptions / Deviations (Technical vs. Contractual)

# Proposal Content (continued)

## **Forms:**

- Exhibit D – Status of Past and Present Contracts
- Exhibit E – Level 1 Safety Specifications (not submitted with proposal)
- Exhibit F – Proposal Exceptions and Deviations Form

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

# Proposal Content (continued)

- Cost and Price Proposal – Exhibit B
  - Offeror shall submit proposed pricing to provide services described in Exhibit A, Scope of Work
  - The Offeror shall complete and sign the “ Price Summary Sheet” form included with this RFP (Exhibit B)

# Evaluation and Award

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

Qualifications of the firm	20%
Staffing and project organization	30%
Work plan	30%
Cost & Price	20%

- Evaluation Committee is comprised of internal OCTA staff and external.



# Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interview
- Interviews are scheduled for **February 7, 2022**
- Offerors are requested to keep this date available

# Award

- Award Process
  - At the conclusion of the evaluation process, the evaluation committee will award to the Offeror with the highest ranked final proposal
  - The Authority may or may not negotiate contract terms with the selected Offeror prior to award
  - All firms submitting a proposal will be notified of Award via CAMM NET

# Proposed Agreement

- Proposed Agreement
  - Please review the Proposed Agreement (Exhibit C) so you are aware of the contractual requirements of the solicitation
- Exceptions
  - Any exceptions/deviations must be identified in Exhibit F – Proposal Exceptions and/or Deviations Form



# Proposed Agreement

- Offerors are encouraged to review:

Article 3 -	Scope of Work
Article 4 -	Term of Agreement (2-Year Term)
Article 5 -	Payment (Firm-Fixed Price)
Article 7-	Maximum Obligation
Article 9 -	Insurance
Article 17 -	Conflict of Interest/Prohibitions
Article 18 -	Code of Conduct

# Scope of Work

## Scope of Work

Name of Project Manager

Lauren Sato, Transportation Analyst

Project Overview and Scope of Work

- Questions?



- Reminder.... Proposals are due @ 2:00 pm on January 24, 2022
- Please send your pre-proposal conference sign in sheets to [ycrowder@octa.net](mailto:ycrowder@octa.net) at or before January 10, 2022, 4:30 p.m.
- Please register on CAMM NET
- Thank you for your interest in OCTA! Stay safe and healthy.