



February 27, 2023

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) 2-2980
"Rider Validation System"**

All Offerors:

This letter shall serve as Addendum No. 1 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 4, 2023**.

A pre-proposal conference will be held on February 28, 2023 at 10:00 a.m. **VIA TELECONFERENCE ONLY**. Prospective offerors may call-in using the following credentials:

- [Pre-Proposal Conference MS Teams Link](#)
- OR Call-in Number: +1 916-550-9867
- Conference ID: 636 840 080#

The pre-proposal registration sheet is presented as Attachment A and the 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 ideneau@octa.net no later than 5:00 p.m., February 28, 2023.

Offerors are reminded to acknowledge receipt of this Addendum No. 1 in their transmittal letter and Exhibit B, "Price Summary Sheet." 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 ideneau@octa.net.

Sincerely,

Iris Deneau
Senior Contract Administrator
Contracts Administration and Materials Management

PRE-PROPOSAL CONFERENCE REGISTRATION**OCTA** RFP #: 2-2980

Date: February 28, 2023

Title: Rider Validation System

1. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: (_____) _____ Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐ DBE ☐

E-Mail Address: _____

2. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: (_____) _____ Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐ DBE ☐

E-Mail Address: _____

3. Company Name: _____

Attendee: _____

Address: _____

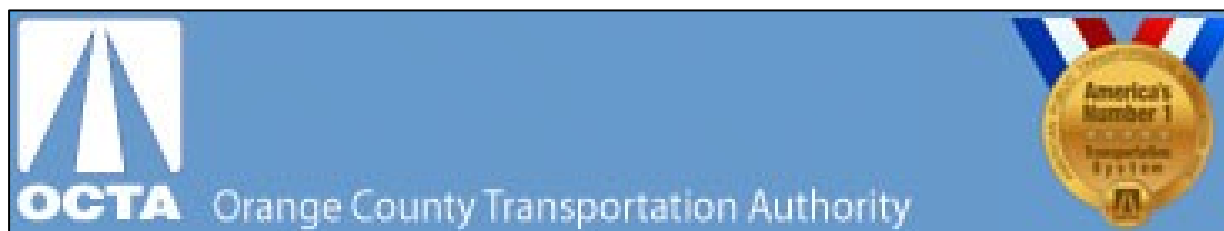
City, State Zip: _____

Phone Number: (_____) _____ Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐ DBE ☐

E-Mail Address: _____

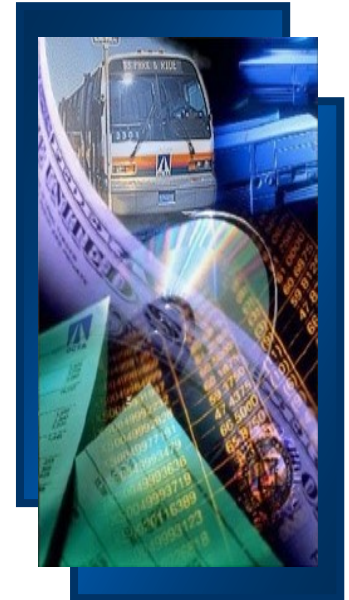
Pre-Proposal Conference for RFP 2-2980: Rider Validation System



Agenda

ATTACHMENT B

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



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 ATTACHMENT B

- 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/>

Vendor Video Training

ATTACHMENT B

- How to Submit a Responsive Proposal to an RFP
- Developing a Winning Proposal
 - Both videos available at: <https://cammnet.octa.net/vendor-training/>

Key Procurement Dates

ATTACHMENT B

Written Questions Due:

March 6, 2023

OCTA Responds:

March 15, 2023

Proposals Due:

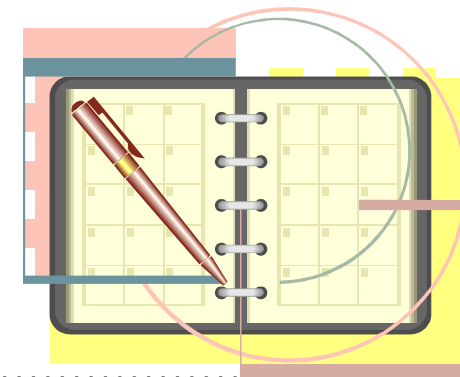
April 4, 2023, 2:00 PM

Interviews:

May 10, 2023

Board of Directors:

July 10, 2023



Key Procurement Information

ATTACHMENT B

- All questions/contact with Authority staff should be directed to Iris Deneau, Senior Contract Administrator
- Next Addendum will contain a copy of the Pre-Proposal sign-in sheet
- Award based on prime-sub relationship, not joint ventures
- Contract term is for a five-year initial term with one, five-year option term

Guidelines for Written Questions

ATTACHMENT B

- Questions must be submitted directly to Iris Deneau, Senior Contract Administrator, in writing, by: **March 6, 2023, 5:00 p.m.**
- E-mail recommended: idenneau@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 are non-binding

Next...
Proposal Instructions

Followed by...
Review of Scope of Work

Proposal Submittal Instructions

ATTACHMENT B

- Proposals are due by 2:00 p.m., April 4, 2023
- Proposals are to be submitted electronically as specified in the RFP
- The link has an upload file size limit of 80MB
- The Authority will not accept hard copy proposals for this RFP

Proposal Submittal Instructions (continued)

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- 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

- 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)

Forms:

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

Note: Forms excluded from 200-page proposal limit.

- Cost and Price Proposal – Exhibit B
 - Offeror shall submit proposed pricing to provide services described in Exhibit A, Scope of Work
 - Offerors shall complete the Excel file entitled **OCTA RVS PriceSheets.xlsm**
 - Offerors shall only enter pricing as directed by the Price Summary Sheet instructions provided in the RFP
 - Offerors shall make no changes to the Price Summary Sheet form

Evaluation and Award

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

Qualifications of the firm	20%
Staffing and project organization	20%
Work plan	35%
Cost & Price	25%

- Evaluation Committee comprised of internal OCTA staff

Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interview
- Interviews are scheduled for **May 10, 2023**
- Offerors are requested to keep this date available

- Award Process

- Evaluation Committee recommends highest ranking Offeror to the Finance and Administration (F&A) Committee
- The F&A Committee makes recommendation to Board of Directors (BOD)
- 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 C) so you are aware of the contractual requirements of the solicitation
- Exceptions
 - Any exceptions/deviations must be identified in Exhibit G – 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 6 - Maximum Obligation
 - Article 9 - Insurance

Scope of Work

Isaac Herrera
Project Manager

Project Overview and Scope of Work

Rider Validation System Goals

ATTACHMENT B

- Improve customer convenience and experience
- Facilitate fare policy equity and innovation
- Validate ridership for revenue reimbursement for pass programs and improve data collection for analysis capabilities
- Reduce onboard cash usage, bus dwell time and operator workload
- Enhance intermodal and regional interoperability

Key Features of the RVS

ATTACHMENT B

- Account-based back office utilizing a proven design that has been previously deployed in a comparable transit environment
- Issuance of contactless smartcard fare media, with support for other forms of fare media
- Deploy a retail network of “gift card” retail locations where customers can purchase and reload electronic fare media
- Support for modern and innovative fare policies including stored value, reduced fares, fare capping, institutional programs, and other special programs
- Ability to accept Open Payments including contactless debit/credit cards and mobile wallets such as Apple and Google Pay

Key Features of the RVS

- Deployment of public and institutional websites that offer comprehensive account management and administrative features
- Ability to manage and process transactions from several channels including fare validators (bus and rail), TVM, websites, inspection devices, mobile ticketing, and retail network
- Electronic payment processing compliant with PCI and EMV standards
- PCI compliant hosted or cloud-based central management system to manage and configure the system, in addition to reporting and data querying capabilities.
- Open architecture with unrestricted access to system API to allow future integration and expansion of the system.

Key Features of the RVS

- Option for an integrated mobile ticketing solution
 - Shares a common back office with RVS
 - Utilizes modern design and functionality
 - Ability to customize text and key design elements
 - Proven quality control and standardized maintenance releases
 - Experience troubleshooting and resolving bugs efficiently
 - Ability to pay with cash at retail network

RVS Timeline

- Aggressive but flexible
 - 18 months from NTP to final acceptance
 - 2 design review phases
 - Lab and Field testing
 - Pilot prior to system acceptance testing

Phase	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Notice to Proceed (NTP)																			
Requirements Review																			
Design Review																			
Development and Implementation																			
Lab and Field Testing																			
Pilot																			
Training																			
Final Acceptance																			

- Questions?



- Reminder.... Proposals are due @ 2:00 pm on April 4, 2023
- Please complete registration sheet
- Please register on CAMM NET
- Thank you for your interest in OCTA!