



NOTICE TO OFFERORS

March 23, 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 Proposal (RFP) 3-2268
"Electric Bicycle Safety Plan"**

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 due date is at or before **2 p.m., April 10, 2023**.

Addendum No. 1 is issued to present the pre-proposal registration sheet as Attachment A and the PowerPoint presentation is presented as Attachment B to this Addendum No. 1. Attendees are advised to complete the pre-proposal registration sheet (Attachment A) and email it to the undersigned at gtorres@octa.net, no later than 10:00 a.m., March 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 gtorres@octa.net.

Sincerely,

Gina Torres
Contract Administrator
Contracts Administration and Materials Management



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: **3-2268**

Date: **March 28, 2023**

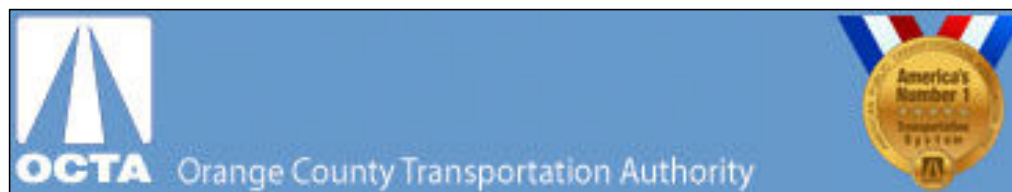
Title: **Electric Bicycle Safety Plan**

-
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

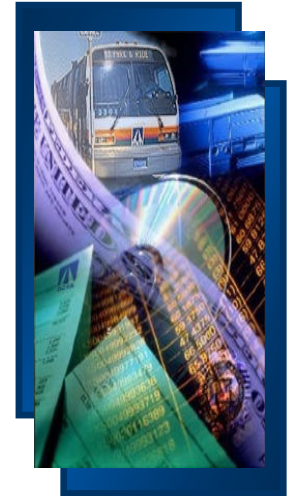
RFP 3-2268

“Electric Bicycle Safety Plan”



Agenda

- Introductions
- Purpose of Pre-Proposal Conference
- Online Business and Networking Tools
- Key Procurement Information & Dates
- Review of RFP Documents
- Scope of Work
- Questions and Answers Session
- Closing



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

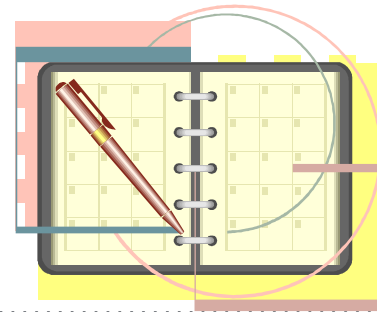
- CAMM NET Connect
 - <https://www.facebook.com/CammnetConnect>
- Working with OCTA
 - <https://cammnet.octa.net/about-us/working/>
- Planholder's List
 - <https://cammnet.octa.net/procurements/planholders-list-selection/>

Vendor Video Training

- 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

Written Questions Due:	March 31, 2023, 2:00 PM
OCTA Responds:	April 5, 2023
Proposals Due:	April 10, 2023, 2:00 PM
Interviews:	April 27, 2023



Key Procurement Information

- Next Addendum will contain a copy of the Pre-Proposal sign-in sheet and the answers to our Q&A session.
- Award based on prime-sub relationship, not joint ventures

Guidelines for Written Questions

- Questions must be submitted directly to Gina Torres, Contract Administrator, in writing, by: **March 31, 2023, 2:00 p.m.**
- E-mail: gtorres@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

- Proposals are due by 2:00 p.m., on **April 10, 2023**.
- **Proposals must be submitted, electronically**, through the following URL link: <http://www.octa.net/Proposal Upload Link>, at or before the deadline of **2:00 p.m. on April 10, 2023**. The link has an **upload file size limit of 80MB**. Authority will not accept hard copy proposals for this RFP.

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 Submittal Instructions (continued)

- Conflict of interest
- Code of conduct
- Contract type will be firm-fixed price for the services described in the Scope of Work, included in this RFP as Exhibit A. The contract term is for an eighteen (18)-month term.

Proposal Content

- Letter of Transmittal
- Technical proposal
 - a) Qualifications, related experience and references
 - 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
- Exhibit F - Proposal Exceptions and/or Deviations

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	25%
Staffing and project organization	20%
Work plan	30%
Cost & Price	25%

- Evaluation Committee is comprised of internal OCTA staff members

Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interviews (if needed).
- Interviews are scheduled for **April 27, 2023**.
- Offerors are requested to keep this date available.

Award

- Award Process
 - Evaluation Committee recommends highest ranking Offeror for 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 and submitted with the proposal.



Proposed Agreement

- Offerors are encouraged to review the entire agreement, in particular:
 - Article 3 - Scope of Work
 - Article 4 - Term of Agreement
 - Article 5 - Payment (firm-fixed)
 - Article 6 - Maximum Obligation
 - Article 9 - Insurance

Scope of Work

(Exhibit A)

Peter Sotherland

Principal Transportation Analyst, Planning & Analysis

Project Overview and Scope of Work

Scope of Work

- Overarching Goals
 - 18-month project with a \$200,000 budget
 - Identify gaps and needs in outreach, education, encouragement, data, and funding for safe e-bike use
 - Conduct e-bike rodeo/education events
 - Partner with stakeholders to identify high use areas and other areas of concern
 - Strengthen countywide efforts to improve safe e-bike use
 - Identify funding opportunities
 - Develop an Action Plan for the next steps

Scope of Work

Task 1: Project Management

Task 2: Stakeholder engagement

- Stakeholder assessment/development
- Five (5) Stakeholder meetings
- Survey

Scope of Work

Task 3: Community Engagement

- Two (2) virtual open houses
- Two (2) e-bike safety rodeos
- Four (4) OCTA committee meeting presentations (slide decks only)

Task 4: E-bike Resource Evaluation

- Ten (10) Interviews (virtual)
- Data source inventory
- Non-infrastructure inventory

Scope of Work

Task 5: Gap analysis and Strategy Development

- Gap analysis based on tasks 2, 3, and 4
- Safety strategies development
- How-to tool kit
- Final plan and presentation

- Questions?



- Reminders
 - Questions and Answers session closes March 31, 2023, at 2:00 pm
 - Proposals are due @ 2:00 pm on April 10, 2023
 - Please submit the pre-proposal registration sheet
 - Please register on CAMM NET
- Thank you for your interest in OCTA.