



## NOTICE TO OFFERORS

April 5, 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) 3-2269  
"Sustainability Program Support Services"**

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., May 23, 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. Additionally, offerors are notified that established date to conduct interviews has been changed from June 8, 2023, to June 12, 2023. Attendees are advised to complete the pre-proposal registration sheet (Attachment A) and email it to the undersigned at [gtorres@octa.net](mailto:gtorres@octa.net), no later than 10:00 a.m., March 9, 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](mailto:gtorres@octa.net).

Sincerely,

A handwritten signature in cursive script that reads "Gina Torres".

Gina Torres  
Contract Administrator  
Contracts Administration and Materials Management



# PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: 3-2269

Date: May 9, 2023

Title: Sustainability Program Support Services

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: \_\_\_\_\_

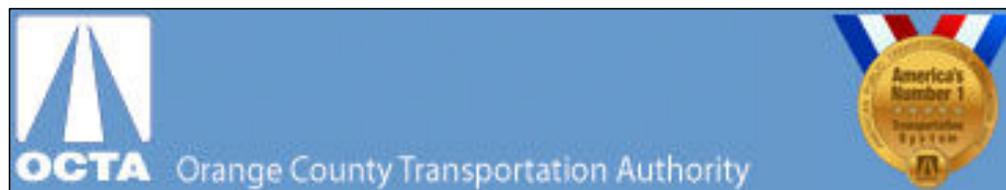
Phone Number: (\_\_\_\_\_) \_\_\_\_\_ Registered on CAMM NET?  Yes  No

Prime  Sub  DBE

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

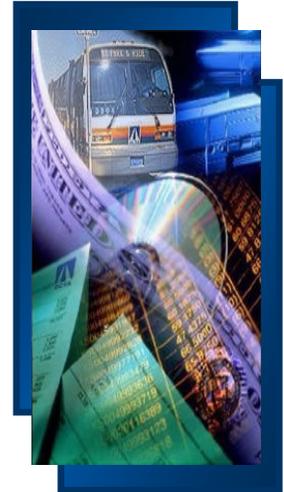
# Pre-Proposal Conference for **RFP 3-2269**

## “Sustainability Program Support Services”



# 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

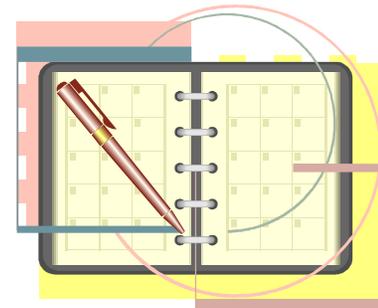
- CAMM NET Connect
  - <https://www.facebook.com/CammnetConnect>
- Working with OCTA
  - <https://cammnet.octa.net/about-us/working/>
- Planholder's List
  - <https://cammnet.octa.net/procurements/planholders-list-selection/>

# 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:	May 11, 2023, 2:00 PM
OCTA Responds:	May 16, 2023
Proposals Due:	May 23, 2023, 2:00 PM
Interviews:	June 12, 2023



# Key Procurement Information

- Next Addendum will contain a copy of the Pre-Proposal sign-in sheet and the answers to questions received by the deadline.
- 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: **May 11, 2023, 2:00 p.m.**
- E-mail: [gtorres@octa.net](mailto: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 **May 23, 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 May 23, 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 time-and-expense price for the services described in the Scope of Work, included in this RFP as Exhibit A. The contract term is for three (3)-years.

# 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 – Campaign Contribution Disclosure Form
- Exhibit F – Level 1 Safety Specifications
- Exhibit G – 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	20%
Staffing and project organization	30%
Work plan	30%
Cost & Price	20%

## Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interviews (if needed).
- Interviews are scheduled for **June 12, 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 G – 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 (time-and-expense)
  - Article 6 - Maximum Obligation
  - Article 9 - Insurance

# Scope of Work

(Exhibit A)

**Lauren Sato**

Transportation Analyst, Project Development

Project Overview and Scope of Work

# Scope of Work

## Background

- February 2022: OCTA began development of its first Climate Adaptation and Sustainability Plan (CASP)
- Late summer/early fall 2023: Final CASP anticipated to be completed

## CASP Purpose

- Enable OCTA to keep Orange County moving amidst the impacts of climate change
- Support the Board and CEO Initiatives
- Advance APTA Sustainability Commitment
- Maintain consistency with State priorities

# Scope of Work

## CASP Overview

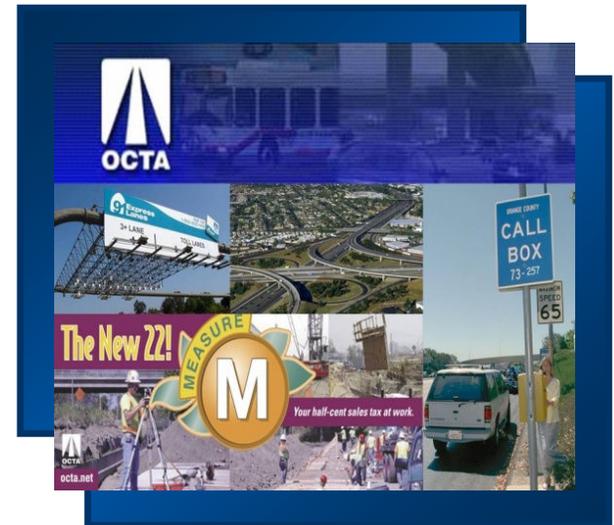
- Climate Adaptation
  - Vulnerability Assessment
  - Adaptation Strategy Recommendations
- Sustainability/Climate Change Mitigation
  - Greenhouse Gas Emissions Inventory
  - Sustainability Strategy Recommendations
- Progress Monitoring/Reporting Framework

# Scope of Work

## Sustainability Program Support

- Review adaptation and sustainability strategies recommended in CASP
- Provide guidance on next steps/prioritization of future projects
- Assist with tracking, monitoring, and reporting progress
- Identify grant funding opportunities
- Ensure efforts are consistent with State and Federal regulations
- Conduct stakeholder engagement (where appropriate)
- Support overall resiliency and sustainability goals of OCTA; offer recommendations for improvement

- Questions?



- Reminders
  - Questions and Answers session closes May 11, 2023, at 2:00 pm
  - Proposals are due @ 2:00 pm on May 23, 2023
  - Please submit the pre-proposal registration sheet
  - Please register on CAMM NET
- Thank you for your interest in OCTA.