



September 19, 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*

**NOTICE TO OFFERORS**

**SUBJECT: Request for Proposals (RFP) 3-2607  
“Rideshare and Vanpool Marketing Services”**

Gentlemen/Ladies:

This letter shall serve as Addendum No. 2 to the above RFP issued by the Orange County Transportation Authority (OCTA). Offerors are reminded that the proposal submittal date is at or before **2:00 p.m., October 2, 2023.**

A pre-proposal conference was held both on-site/in-person and via teleconference on September 7, 2023. The pre-proposal registration sheets are presented as Attachment A to this Addendum No. 2.

The following is a response to a written question received on or before 5:00 p.m., on September 12, 2023, as stated in the RFP package.

Question 1: Do you want to see a proposed budget breakdown, or will that decision be made between OCTA and the contract winner after the fact?

**Response 1: The budget breakdown will be decided at a later time based on the needs of the agency. OCTA can share a rough estimate of planning for each year, but it is subject to change. Each project however does require an approved estimate before starting work.**

Question 2: Can you please confirm that the Exhibit F-3 Good Faith Efforts form is not mandatory if a proposer meets the 9% DBE Goal?

**Response 2: It is not mandatory if you meet the 9% goal with DBEs certified in the scopes of work assigned.**

Question 3: Is the 9% DBE requirement a 9% off the project as a whole, or off of a specific service in the project (ex: 9% of the video production needs to be by a DBE)?

**Response 3: The 9% goal applies to the total amount of the contract, not each scope of work.**

Question 4: Of the various target markets listed on pgs. 2 and 3 of Exhibit A in the RFP, which target market groups does OCTA prioritize for conducting research?

Response 4: **OCTA is looking to target all groups within the county. We seek a contractor who will help us reach all who could use our services within the county.**

Question 5: Is the market researcher expected to conduct on-board surveys of OCTA riders?

Response 5: **OCTA does not have any surveys planned at this time, but that is subject to change due to agency needs.**

Question 6: There are other research costs that will not be assigned to the labor categories listed for market research (Market Research Manager, Market Research Analyst) in the Price Summary Sheet. How should these costs be shown in the Price Summary Sheet?

Response 6: **Per the Price Summary Sheet, additional other direct costs required and authorized by OCTA but not included in the contract will be reimbursed (a) "at cost" or (b) up to the applicable current rate listed in this Schedule II, whichever is less. Supporting documentation must accompany invoice.**

**It is recommended that Offerors address such "other research costs" as part of their proposal submission.**

Question 7: How many employers currently participate in Rideshare?

Response 7: **Roughly 200 companies have Rideshare programs.**

Question 8: For research purposes, what type of contact information, if any, will OCTA provide for the following groups?

- Companies that participate in Rideshare
- Companies that participate in OC Vanpool
- Lists of employees who use Rideshare and Vanpool
- Lists of transit pass holders for rail and bus

Response 8: **OCTA will provide contact information as is relevant depending on the project.**

- Question 9: Are AVR Survey results available by company?
- Response 9: OCTA has AVR survey results for companies that conduct them, and it can share as is relevant.**
- Question 10: Will OCTA provide contact information for Employer Transportation Coordinators with companies that utilize the AVR Survey?
- Response 10: OCTA will share contact data as is relevant.**
- Question 11: What confusion or obstacles does the OC Rideshare program currently face?
- Response 11: OCTA's main obstacle is educating the public and what rideshare truly is and getting past misconceptions.**
- Question 12: What are the most common misperceptions of your organization?
- Response 12: Many think that vanpooling is something that you must do every day but there is flexibility. That is a common misconception of that program.**
- Question 13: What organizations are competitors for attention, funding, and support?
- Response 13: OCTA does not have competitors as it is simply looking to further ridesharing regardless of how it is done.**
- Question 14: Is this RFP required due to the expiration of the current contract? If yes, is the incumbent agency eligible for renewal?
- Response 14: Yes, the RFP is required due to expiration of the current contract and the incumbent is not precluded from submitting a proposal in response to the RFP.**
- Question 15: What contractual sponsorships or commitments extend into the contract period?
- Response 15: There are none at this time.**
- Question 16: Describe the approval process and who approves advertising plans and creative concepts.

**Response 16: The plan is approved by two or three managers utilizing a sign-off sheet.**

Question 17: What customer or category research will be available to the selected agency?

**Response 17: OCTA has several studies based on commute trends from the past three years.**

Question 18: What is the project's estimated timeline from agency selections to the approved asset deployment?

**Response 18: The contract will be executed by 3/1/2024.**

Question 19: As a percentage, what is your best estimate of how agency services will be used?

| Service  | Percentage  |
|--|-------------|
| Strategy and planning  |             |
| Creative concepts and designing deliverables   |             |
| Account service and project management   |             |
| Web and digital development and management   |             |
| Media planning, placement, and stewardship   |             |
| Analysis of business metrics   |             |
| Public relations and external communications   |             |
| Extra pair of hands to get stuff done  |             |
| Fighting fires   |             |
| Reworks and revisions due to miscommunication, change in strategy, or someone has a last-minute idea to explore? |             |
| <b>Total</b>   | <b>100%</b> |

**Response 19: The project is dynamic and OCTA cannot estimate these numbers.**

Question 20: What key performance indicators (KPIs) will be measured to determine the success of advertising? What tools are used to track inquiries, leads, and sales?

**Response 20: Vanpools formed and Perk Pass accounts opened are major metrics but we also track impressions.**

Question 21: If you were forced to pick only one type of relationship with a marketing firm for this project, which would you select?

- a. Follow Orders - An agency that executes your ideas and acts as a helping hand to get things done.
- b. Team Player - A collaborator who thinks and works with you to create assets.
- c. Stroke of Genius - A thought leader and subject matter expert who leads you, constructively challenges assumptions, and offers fresh perspectives.

**Response 21: If OCTA was forced to pick one, it would be Team Player; however, all three are important for the success of the project. OCTA is looking for a company that best meets the requirements set forth in the RFP and Scope of Work.**

Question 22: It's three years from today. We are toasting success, and you're delighted with OC Rideshare's progress in the last three years. What's happened to make you so happy?

**Response 22: OCTA has formed 200 new vanpools and opened 50 Perk Pass accounts.**

Question 23: Please clarify the total budget for the stated scope of work. A budget of \$616,667 is listed for a two-year term, but it is also stated that the OC Vanpool has a separate budget.

- a. What is the total budget?
- b. How has this been split across the various programs and campaigns?
- c. How has this budget historically been split between, as a percentage, traditional media,

digital media, production, website, events, and agency fees?

**Response 23: This is the total budget. OC Vanpool is included. The budget codes are separated for funding reasons. OCTA has \$120,000 to spend on advertising.**

**Question 24:** If the prime contractor is a registered DBE, will that fulfill the requirement, or will additional DBE subcontractors be needed?

**Response 24: If the Prime is DBE certified in the scopes of work to fulfill the contract, then that meets the DBE requirement and no other DBE subcontractors are required; however, Offerors must submit the DBE commitment form and list the eligible DBE amount as the proposed contract amount minus any non-DBE subconsultant commitments.**

**Question 25:** If you were to prioritize your stated objectives, how would you rank them in order of importance:

| Goal   | Rank |
|--|------|
| Increase the use of a full range of OCTA transportation options                            |      |
| Grow ridesharing awareness and participation at employer sites, universities, and colleges |      |
| Increase employer participation in the OCTA Employer Rideshare program                     |      |
| Increase commuter participation in OCTA Rideshare programs and promotions                  |      |
| Stimulate the use of alternative transportation modes                                      |      |

**Response 25: These are all of equal importance.**

**Question 26:** On page 19 of the RFP, an evaluation committee is mentioned. Could you please share the roles that will be included on that committee?

**Response 26: The role of the evaluation committee is to review and score the proposals received.**

Question 27: For previous rideshare and vanpooling campaigns, what does OCTA consider the most successful campaign and why?

**Response 27: A direct mail campaign where we formed 7 vanpools.**

Question 28: Would it be possible to receive a recording for the pre-proposal conference session?

**Response 28: No, the pre-proposal conference meeting was not recorded.**

Question 29: Is there an incumbent agency who has provided these services on behalf of OCTA in the past? If so, is there a desire to find a new agency partner? Can you disclose the incumbent?

**Response 29: Yes, the incumbent firm is Brown Marketing Strategies, Inc.**

Question 30: We noticed that public relations is not featured in the scope of services list but think that it would be valuable for these programs. If we would recommend public relations, is that an allowable "enhancement or technical innovation to the scope" that we could include in our Work Plan of the proposal?

**Response 30: Public relations is not a part of the scope and will not be included.**

Question 31: On page 1 of Exhibit A, it mentions that OC Rideshare Marketing is highly concentrated on three annual campaigns - "May's Bike Month, June's Dump the Pump and October's Rideshare Week." Are any of these campaigns larger/more successful than others? What else should we know about each distinctive campaign?

**Response 31: Dump the Pump has been less important recently. The other two are of equal importance. Bike Month focuses on biking only. Rideshare Week focuses on all modes of transportation.**

Question 32: Can you provide an idea of the budget split between OC Rideshare and OC Vanpool marketing? Does the budget support both campaigns pretty equally or focus more on one?

**Response 32: Rideshare is a larger concentration for the project.**

Question 33: What types of partners and other organizations does OCTA collaborate with to promote OC Rideshare and Vanpool programs?

**Response 33: Metrolink is a partner for train and AVR Vanpool, Commute with Enterprise and Green Commuter are our vanpool leasing partners.**

Question 34: Do hard/printing costs for promotional items, printed materials and swag need to be factored into the greater annual budget as listed in this RFP, or are those budgets allocated separately?

**Response 34: Yes, this budget includes promotional materials.**

Question 35: What are some of the factors that are most important to OCTA in finding a new agency? (if there is anything specific to add outside of the Evaluation Criteria listed on pg 19 of the RFP)

**Response 35: The evaluation criteria outlined in the RFP will be used to select a firm.**

Question 36: Among the multiple objectives listed and both B2B and B2C components, are there any that OCTA would deem as Rideshare and Vanpool's highest priorities to set viable KPIs for each?

**Response 36: Vanpools formed and Perk Pass accounts formed are highest priorities as far as program participation. Pledges for Rideshare Week and Bike Month are most important for those campaigns.**

Question 37: How important is the Strategic Marketing Plan Development within the scope of two-year deliverables? Is there a recommended percentage of budget we should devote to it, given it will have both short- and long-term benefits?

**Response 37: The majority of the budget will be for the two-year period.**

Question 38: Among the various target audiences listed, would OCTA value recommendations centering on select audiences to maximize campaign impact?



**Response 38: OCTA targets all audiences equally as it serves the entire county.**

Question 39: Are there any OC employers that have activated a program that OCTA deems noteworthy to share with the B2B or B2C audience as an example of what works to incentivize interest?

**Response 39: OCTA cannot share this information at this time.**

Question 40: Are you interested in your consultant developing a target list of B2B prospects and assisting in the acquisition process?

**Response 40: B2B prospects are very important and OCTA would like assistance with this.**

Question 41: Is there a specific multicultural group you'd prefer we focus on given past/recent Rideshare/Vanpool ridership results?

**Response 41: OCTA is looking to target all demographics equally.**

Question 42: With regard to Community Engagement, has there been interest from community members to address concerns and gather input on the ride-sharing services' impact on the area?

**Response 42: OCTA works with many community organizations and have a different division that specializes in this.**

Question 43: Of the three (3) Marketing areas of focus - National Bike Month, Dump the Pump and Rideshare Week:

- Must we focus on all three efforts equally or can we place more weight/focus on select programs that may generate more results for OCTA?
- Are there any representatives or constituents at any of the groups listed to provide insight to our team on solidifying or enhancing partnership(s) in place?

**Response 43: The weight of the campaigns is decided by OCTA based on agency needs. Dump the Pump has been less emphasized recently however.**

Question 44: From the types of marketing services provided within the RFP and based on history, which of the tactics listed would

OCTA deem to be/have been most appropriate/effective, and why?

**Response 44: Vanpool direct mail has been very effective.**

Question 45: Does OCTA have any current employer incentives in play to increase rideshare and vanpool ridership among Orange County employees?

**Response 45: OCTA has various incentives including vanpool incentives and bus pass discount programs.**

Question 46: Given the history, would SCAQMD be open to a Q/A about what they might help support or recommend exploring, or programs they currently align with?

**Response 46: OCTA works closely with South Coast AQMD and can explore this option.**

Question 47: Are there any reports or insights related to programs that either B2B or B2C audiences you value most, or that could help identify what could be/have been enhanced?

**Response 47: OCTA can share its research that is relevant, but OCTA targets all audiences equally.**

Question 48: Does OCTA have access to a list of current Vanpool or Rideshare participants who could be considered for insights, testimonials or other efforts?

**Response 48: OCTA does have access to this data.**

Question 49: Have you executed any focus groups to elicit feedback from current / former employers or riders?

**Response 49: Yes, OCTA has done this type of research before.**

Question 50: Is media included in the \$616k two-year budget or is it incremental?

**Response 50: Yes, it is included in the budget.**

Question 51: What is the media budget allocation and who will be executing planning/buying?

**Response 51: The media budget is \$120,000 for the initial term. Contractor will be responsible for all aspects of the media buying process.**

Question 52: If we present a concept for a new offer to incentivize increased Rideshare or Vanpool ridership and should it be approved, would funding to support the promo offer come from the same budget, or does OCTA have separate promo funding allocated for this?

**Response 52: This program is intended to market existing programs and incentives.**

Question 53: Should our company be selected, would OCTA consider attending an in-person launch meeting day to distill best practices, economies of scale and foster team collaboration?

**Response 53: Yes, an in-person meeting is an option.**

Offerors are reminded to acknowledge receipt of this Addendum No. 2 in their transmittal letters 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 [mbahadori@octa.net](mailto:mbahadori@octa.net).

Sincerely,



Masih Bahadori  
Section Manager, Procurement  
Contracts Administration and Materials Management

# PRE-PROPOSAL/PRE-BID CONFERENCE REGISTRATION



**OCTA** RFP/IFB #: RFP 3-2607

Date and Time: September 7, 2023 @ 2:30pm

RFP 3-2607  
ADDENDUM NO. 2  
ATTACHMENT A

Title: Rideshare and Vanpool Marketing Services

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1. Company Name: JPG, INC. (dba Oak Leaf Productions)  
Attendee: Vanessa Charre-Cueva  
Address: 300 Pacific Coast Hwy #440,  
City, State Zip: Huntington Beach, CA 92648  
Phone Number: ( 310 ) 663.2893 Registered on CAMM NET? ☐ Yes ☒ No  
Prime ☒ Sub ☐ DBE ☐  
E-Mail Address: vcharre-cueva@oakleafproductions.com

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2. Company Name: \_\_\_\_\_  
Attendee: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State Zip: \_\_\_\_\_  
Phone Number: ( ) Registered on CAMM NET? ☐ Yes ☐ No  
Prime ☐ Sub ☐ DBE ☐  
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 ☐ DBE ☐  
E-Mail Address: \_\_\_\_\_

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Title: Rideshare and Vanpool Marketing Services

1. Company Name: Nexstar Media Group / KTLA 5  
Attendee: Karly Quezada  
Address: 5800 W. Sunset Blvd.  
City, State Zip: Los Angeles, CA 90028  
Phone Number: ( 714 ) 869-8551 Registered on CAMM NET? ☒ Yes ☐ No  
Prime **EzTsub** ☐ DBE ☐  
E-Mail Address: Karly.quezada@KTLA.com

2. Company Name: \_\_\_\_\_  
Attendee: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State Zip: \_\_\_\_\_  
Phone Number: J \_\_\_\_\_ 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 ☐  
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Title: Rideshare and Vanpool Marketing Services

- 
1. Company Name: Nemoui Advertising and Design LLC  
Attendee: Thomas Denby  
Address: 235 E. Broadway #800  
City, State Zip: Long Beach, CA 90802  
Phone Number: ( 562 ) 900-9500 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☒ Sub ☐ DBE ☐  
E-Mail Address: thomas@nemoiadv.com
- 
2. Company Name: \_\_\_\_\_  
Attendee: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State Zip: \_\_\_\_\_  
Phone Number: ( ) Registered on CAMM NET? ☐ Yes ☐ No  
Prime ☐ Sub ☐ DBE ☐  
E-Mail Address: \_\_\_\_\_
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3. Company Name: \_\_\_\_\_  
Attendee: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State Zip: \_\_\_\_\_  
Phone Number: ( ) Registered on CAMM NET? ☐ Yes ☐ No  
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ADDENDUM NO. 2  
ATTACHMENT A

Title: Rideshare and Vanpool Marketing Services

- 
1. **Company Name:** Staples Marketing, LLC d/b/a AFFIRM
- Attendee:** Molly Barnes
- Address:** N28W23050 Roundy Drive, Suite 100
- City, State Zip:** Pewaukee, WI 53072
- Phone Number:** ( 262 ) 650-9900 **Registered on CAMM NET?** ☒ Yes ☐ No
- Prime** ☒ **Sub** ☐ **DBE** ☐
- E-Mail Address:** mbarnes@affirmagency.com
- 
2. **Company Name:** \_\_\_\_\_
- Attendee:** \_\_\_\_\_
- Address:** \_\_\_\_\_
- City, State Zip:** \_\_\_\_\_
- Phone Number:** ( \_\_\_\_\_ ) **Registered on CAMM NET?** ☐ Yes ☐ No
- Prime** ☐ **Sub** ☐ **DBE** ☐
- E-Mail Address:** \_\_\_\_\_
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3. **Company Name:** \_\_\_\_\_
- Attendee:** \_\_\_\_\_
- Address:** \_\_\_\_\_
- City, State Zip:** \_\_\_\_\_
- Phone Number:** ( \_\_\_\_\_ ) **Registered on CAMM NET?** ☐ Yes ☐ No
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Title: Rideshare and Vanpool Marketing Services

- 
1. Company Name: Loma Media  
Attendee: Kayle Molnar, John DeBello  
Address: 401 West A Street, Suite 200  
City, State Zip: San Diego, CA 92101  
Phone Number: ( 619 ) 215-5662 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☒ Sub ☐ DBE ☐  
E-Mail Address: kmolnar@lomamedia.com
- 
2. Company Name: Excitant Media  
Attendee: Brandon Bettar, April Ayala  
Address: 1610 R Street, Ste 412  
City, State Zip: Sacramento, CA 95811  
Phone Number: ( 916 ) 398-3700 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☐ Sub ☒ DBE ☐  
E-Mail Address: bbettar@excitantmedia.com
- 
3. Company Name: \_\_\_\_\_  
Attendee: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State Zip: \_\_\_\_\_  
Phone Number: ( ) Registered on CAMM NET? ☐ Yes ☐ No  
Prime ☐ Sub ☐ DBE ☐  
E-Mail Address: \_\_\_\_\_



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1. **Company Name:** Staples Marketing, LLC d/b/a AFFIRM
- Attendee:** Molly Barnes
- Address:** N28W23050 Roundy Drive, Suite 100
- City, State Zip:** Pewaukee, WI 53072
- Phone Number:** ( 262 ) 650-9900 **Registered on CAMM NET?** ☒ Yes ☐ No
- Prime** ☒ **Sub** ☐ **DBE** ☐
- E-Mail Address:** mbarnes@affirmagency.com
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2. **Company Name:** \_\_\_\_\_
- Attendee:** \_\_\_\_\_
- Address:** \_\_\_\_\_
- City, State Zip:** \_\_\_\_\_
- Phone Number:** (       ) **Registered on CAMM NET?** ☐ Yes ☐ No
- Prime** ☐ **Sub** ☐ **DBE** ☐
- E-Mail Address:** \_\_\_\_\_
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3. **Company Name:** \_\_\_\_\_
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RFP 3-2607  
ADDENDUM NO. 2  
ATTACHMENT A

Title: Rideshare and Vanpool Marketing Services

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1. Company Name: TRAFFIK, LLC  
Attendee: Brent Shoji and/or Elijah Trimino  
Address: 874 Spectrum Center Drive  
City, State Zip: Irvine, CA 92618  
Phone Number: ( 949 ) 679.6820 Registered on CAMM NET? ☒ Yes ☐ No  
Prime ☒ Sub ☐ DBE ☐  
E-Mail Address: rfp@traffikonline.com

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2. Company Name: \_\_\_\_\_  
Attendee: \_\_\_\_\_  
Address: \_\_\_\_\_  
City, State Zip: \_\_\_\_\_  
Phone Number: ( ) Registered on CAMM NET? ☐ Yes ☐ No  
Prime ☐ Sub ☐ DBE ☐  
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 ☐ DBE ☐  
E-Mail Address: \_\_\_\_\_