



July 11, 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) 3-2707
“Comprehensive Transportation Funding Programs Review
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 reminded that the proposal submittal date is at or before **2:00 p.m., August 2, 2023**.

A pre-proposal conference will be held on **July 11, 2023, at 10:00 a.m.** The pre-proposal conference will still be held via teleconference, and prospective Offerors may join or call-in using the same credentials as those already provided in the RFP and included below once more:

- [Click here to join the meeting](#)
- Or Call-in Number: +1 916-550-9867
- Conference ID: 610 485 969#

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 lmartinez1@octa.net no later than 5:00 p.m., July 11, 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 lmartinez1@octa.net.

Sincerely,

Luis Martinez

Luis Martinez
Senior Contract Administrator
Contracts Administration and Materials Management

PRE-PROPOSAL/PRE-BID CONFERENCE REGISTRATION**OCTA** RFP #: 3-2707

Date: July 11, 2023

Title: Comprehensive Transportation Funding Programs Review 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: _____

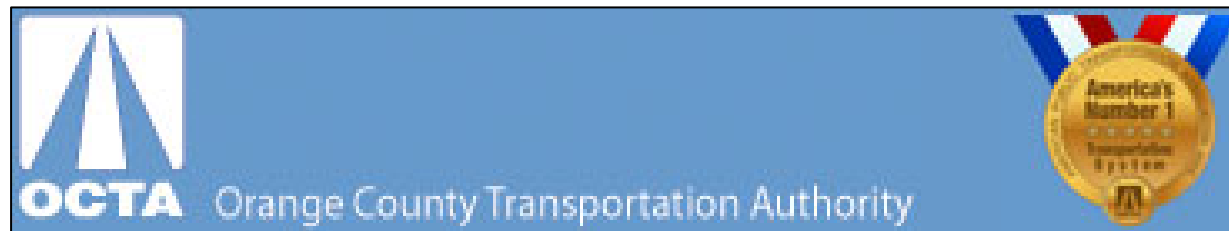
City, State Zip: _____

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

Prime ☐ Sub ☐ DBE ☐

E-Mail Address: _____

Pre-Proposal Conference for RFP 3-2707: Comprehensive Transportation Funding Programs Review Services



Agenda

- Introductions / Opening Statement
- Purpose of Pre-Proposal Conference
- Review of RFP Documents
- Review of the Scope of Work
- Questions and Answers
- Closing



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

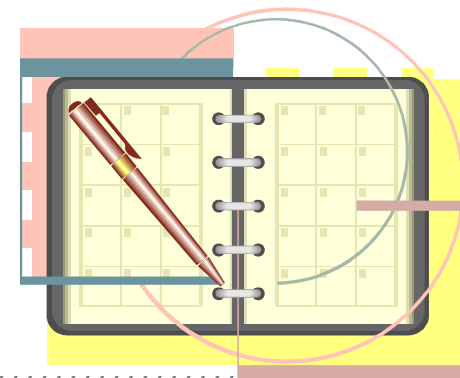
Online Business & Networking Tools

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/>

Key Procurement Dates

- Written Questions Due: July 13, 2023
- OCTA Responds: July 19, 2023
- Proposals Due: August 2, 2023, 2:00 p.m.
- Interview: August 24, 2023
- Board of Directors (BOD): November 13, 2023
- Contract Effective Dates:
 - Effective through November 30, 2026 (Three (3)-Year Initial Term)
 - December 1, 2026 – November 30, 2028 (Two (2), One (1)-Year Option Terms)



Key Procurement Information

- Next Addendum will contain a copy of the Pre-Proposal sign-in sheet.
- Award based on prime-sub relationship, not joint ventures.

Guidelines for Written Questions

- Questions must be submitted directly to Luis Martinez, Senior Contract Administrator, in writing, prior to established due dates.
- E-mail: lmartinez1@octa.net
- Any changes Authority makes to procurement documents will be by written Addenda only.
- Addenda will be issued via CAMM NET.
- Verbal discussions today are non-binding.

Next...
Proposal Instructions

Then...
Review of Scope of Work

Proposal Submittal Instructions

(Refer to RFP Section I, pp. 4)

- Proposals are due by 2:00 p.m. on the date specified in the RFP.
- Proposals are to be submitted as specified in the RFP.
- **PLEASE NOTE: Hard copy proposal submission will not be accepted for this RFP. Proposals must be submitted electronically at the link stated in the RFP and by the date and time as indicated.**

Proposal Submittal Instructions (continued)

(Refer to RFP Section I, p. 4-5)

- 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)

(Refer to RFP Section I, pp. 5-6)

- Conflict of interest
- Code of conduct
- Contract type is time-and-expense

Proposal Content

(Refer to RFP Section II, pp. 9-12)

- Letter of Transmittal
- Technical Proposal
 - a) Qualifications, related experience, and references of Offeror
 - b) Proposed staffing and project organization
 - c) Work plan
 - d) Exceptions / Deviations (Technical vs. Contractual)

- Price Summary Sheet – 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

Proposal Content (continued)

(refer to RFP Section II, pp. 13-14)

- Forms

- Status of Past and Present Contracts Form – Exhibit D
- Campaign Contributions Disclosure Form – Exhibit E
- Proposal Exceptions and/or Deviations Form – Exhibit G

Note: Forms excluded from 50-page proposal limit.

Evaluation and Award

(Refer to RFP Section III, p. 16)

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

Qualifications of the firm	20%
Staffing and project organization	30%
Work plan	25%
Cost and price	25%

Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interview.
- Interviews are scheduled for August 24, 2023. Offerors are requested to keep this date available.

- Award Process
 - Evaluation Committee recommends highest ranking Offeror to the Regional Transportation Planning Committee.
 - Regional Transportation Planning Committee makes recommendation to 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 so you are aware of the contractual requirements of this project
- Exceptions/Deviations
 - Any exceptions and/or deviations must be identified in Exhibit G, Proposal Exceptions and/or Deviations form



Proposed Agreement (continued)

- Offerors are encouraged to review:
 - Article 4 – Term of Agreement
 - Article 5 – Payment
 - Article 6 – Maximum Obligation
 - Article 9 – Insurance

Scope of Work

(Refer to RFP Exhibit A)

Cynthia Morales
Project Manager

Project Overview and Scope of Work

- Questions?



- Reminder.... Proposals are due @ 2:00 p.m. on August 2, 2023.
- Please register on CAMM NET.
- Thank you for your interest in OCTA!