



NOTICE TO OFFERORS

August 29, 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) 3-2540 "Public Outreach Services for South Coast Rail Infrastructure Feasibility Study"

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., September 19, 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., August 31, 2023.

Offerors are notified that the questions due date is hereby extended to September 5, 2023.

Additionally, the Authority would like to clarify that Offerors are to submit their proposal electronically and must submit Exhibit B, Price Summary Sheet, **as a separate sealed package from the proposal** at the address below:

Orange County Transportation Authority
Contracts Administration and Materials Management
600 South Main Street, (Lobby Receptionist)
Orange, California 92868
Attention: Gina Torres, Contract Administrator

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 #: **3-2817**

Date: **August 31, 2023**

Title: **Public Outreach Services for South Coast Rail Infrastructure Feasibility Study**

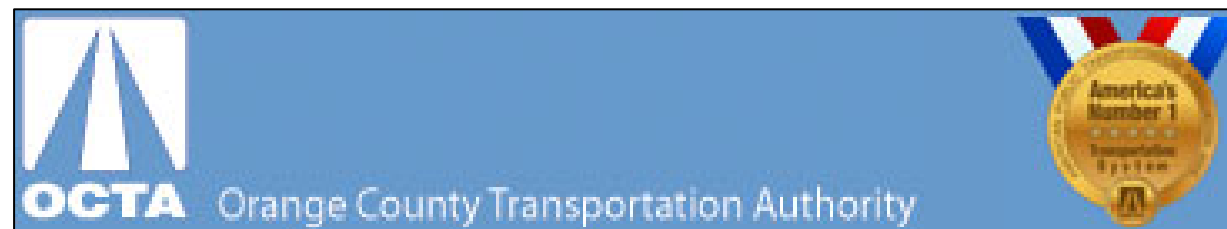
1. Company Name: _____
Attendee: _____
Address: _____
City, State Zip: _____
Phone Number: (_____) _____ Registered on CAMM NET? ☐ Yes ☐ No
Prime ☐ Sub ☐ DBE ☐
E-Mail Address: _____

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 3-2817**

“Public Outreach Services for South Coast Rail
Infrastructure Feasibility Study”



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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

ADDENDUM NO. 1 TO RFP 3-2817
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/>

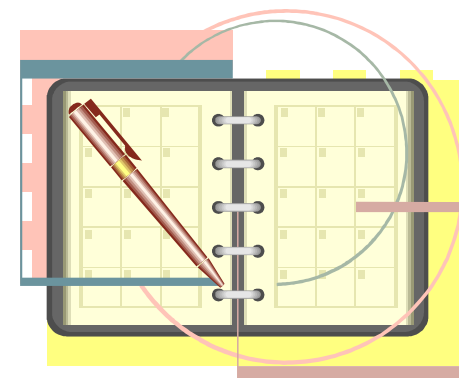
Vendor Video Training

- 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

ADDENDUM NO. 1 TO RFP 3-2817
ATTACHMENT B

Written Questions Due:	September 5, 2023, 2:00 PM
OCTA Responds:	September 7, 2023
Proposals Due:	September 19, 2023, 2:00 PM
Interviews:	October 5, 2023



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 Gina Torres, Contract Administrator, in writing, by: **September 5, 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 **September 19, 2023**.
 - Technical proposals are to be submitted as specified in the RFP.
 - Submit **one (1) original copy of proposal** sealed and clearly identified on exterior of package as specified in the RFP.
 - Submit **one (1) electronic copy** of the entire proposal in “PDF” format on CD, DVD, or flash drive.
 - Contains no information regarding individual hourly rates.
 - Packages clearly marked with the RFP number and title.
- *PLEASE NOTE: This RFP requires separate hard copy submission of the price proposal. Please refer to Section II. p. 13 and Exhibit B.**

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 a two (2)-year term.

- 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)

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.

- Cost and Price Proposal – Exhibit B
 - Offeror shall submit proposed pricing to provide services described in Exhibit A, Scope of Work.
 - **Offeror shall submit Exhibit B, Price Summary Sheet, as a separate, sealed package from the proposal.**
 - **NO information regarding individual hourly rates shall be mentioned anywhere in the proposal content.**
 - Do NOT alter the Job Functions identified on the form.

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

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

- Evaluation Committee is comprised of internal OCTA staff members

- “Short-Listed” firms will be invited to interviews (if needed).
- Interviews are scheduled for **October 5, 2023**.
- Offerors are requested to keep this date available.

- 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 (time-and-expense)
 - Article 6 - Maximum Obligation
 - Article 9 - Insurance

Scope of Work

(Exhibit A)

Christina Byrne

Department Manager, Public Outreach

Project Overview and Scope of Work

Background



Milepost 206.8



- Eroding beaches/bluffs
- Recent coastal studies
- Prior studies by state/federal agencies
- Milepost 206.8 incident
- Clear need to develop phased solutions to address infrastructure impacts

- 24-month Study (*short- to medium-term solutions*)
- Study Area: 7-miles between cities of Dana Point to San Clemente
- Gain an understanding of climate effects on coastal rail infrastructure
- Develop options to protect coastal rail infrastructure in-place at various sea levels
- Identify potential solutions for sand replenishment/retention
- Consult and engage key stakeholders/agencies
 - Project Development Team
 - Stakeholder Working Group
 - Policy Working Group/Elected Roundtable
 - Expert Panel

- Effort will also include:
 - Literature review of previous studies (including geotechnical studies) used to inform options to address issues in the study area
 - Conduct a preliminary geotechnical study of the study area
 - Identify potential conceptual engineering solutions to the challenges along the coast
 - Inventory of other public infrastructure
 - Develop a set of evaluation criteria to consider the feasibility of a range of reasonable ACs that may be viable solutions
 - Develop conceptual plans and profiles on the set of viable solutions including corridor alignments
 - Identify entities and individuals who would be best suited to lead those efforts

Outreach Scope of Work

The consultant shall develop a Public Involvement Plan (PIP) using research, established methods, effective tools, and resources. The PIP must communicate effectively with target audiences and any others that the consultant may identify.

Overarching PIP Goals

- Gain public feedback on strategies to address short and mid-term solutions to address rail infrastructure protection
- Ensure a variety of perspectives are considered.

The consultant shall prepare a PIP overview report after each phase of outreach within the study and a final report at the conclusion of the study. It is anticipated there will be two phases of outreach.

The PIP must meet the following objectives:

- Maximize distribution of information to interested stakeholders locally near the rail alignment and regionally
- Present technical information to the community in ways that can be clearly understood by the general public
- Identify strategies to engage with hard-to-reach and disadvantaged communities
- Use communication tactics appropriate for the nature of information to be distributed and the input required in a cost-effective manner
- Proactively reach out to community leaders and interest groups
- Collect feedback, preferences, and ideas from various interest groups
- Serve as reference for questions about the project
- Help the public understand the project/service's technical planning process.

Some of the anticipated hybrid or in-person meetings that the Public Involvement Program consultant may be expected to help coordinate logistics and create content for (PowerPoint Presentations, fact sheets, etc.) include but are not limited to:

Up to 4 meetings with City Managers

Led by OCTA Government Relations

Up to 4 Elected Officials Roundtables*

Led by the OCTA Government Relations

Up to 6 meetings with the Stakeholder Working Group (SWG)*

Led by technical consultant

Up to 16 meetings with the Project Development Team (PDT)

Led by technical consultant

Up to 4 Community Stakeholder Roundtables*

Led by the Public Outreach Consultant

Up to 4 ad hoc meetings and presentations*

*Outreach Consultant expected to attend

- Reminders
 - Deadline for submitting written questions is on September 5, 2023, at 2:00 pm
 - Proposals are due @ 2:00 pm on September 19, 2023
 - Please submit the pre-proposal registration sheet
 - Please register on CAMM NET
- Thank you for your interest in OCTA.