



**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

December 4, 2023

**SUBJECT: Request for Proposals (RFP) 3-2944, "Harbor Boulevard Pilot Innovative Transit Signal Priority Study"**

Gentlemen/Ladies:

This letter and its Attachments comprise **Addendum No. 1** to the above captioned Request for Proposals issued by the Orange County Transportation Authority ("Authority").

1. Offerors are advised that the pre-proposal conference will be held on-site/in-person on December 6, 2023 at 8:30 a.m. at the Authority's Administrative office, 550 South Main Street, Orange, California in Conference Room 08.

For prospective bidders who wish to join via teleconference, please **join or call-in using the following credentials:**

- [Microsoft Teams Link](#)
- Call-in Number: 916-550-9867
- Conference ID: 690 007 942#

2. **Offerors who attend the pre-proposal conference must fill out the Pre-Proposal Conference Registration sheet presented as Attachment A to this Addendum No. 1, and email, no later than Wednesday, December 6, 2023 at 5:00 p.m. to [mbornman@octa.net](mailto:mbornman@octa.net).**
3. Offerors are advised that a copy of the pre-proposal conference presentation is presented as Attachment B to this Addendum No. 1.

Offerors are reminded to acknowledge receipt of this **Addendum No. 1** in their Letter of Transmittal, which is to accompany the proposal. Offerors are advised that 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 714-560-5064.

Sincerely,

Megan Bornman  
Senior Contract Administrator  
Contracts Administration and Materials Management

**Attachments:**

- Attachment A: Pre-Proposal Conference Registration
- Attachment B: Pre-Proposal Conference PowerPoint Presentation



# PRE-PROPOSAL REGISTRATION

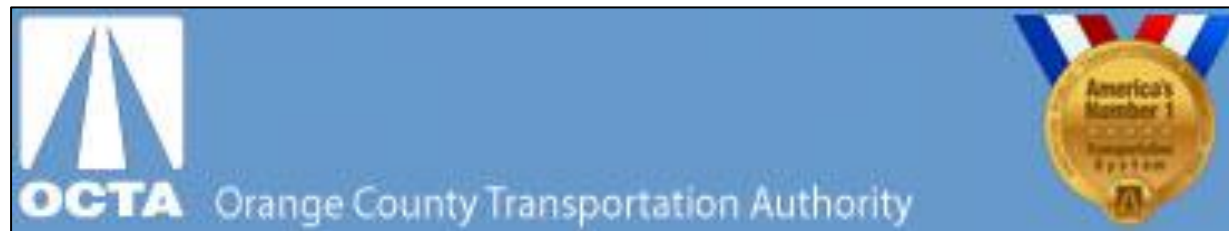
RFP 3-2944

Date: December 6, 2023

Title: Harbor Boulevard Pilot Innovative Transit Signal Priority Study

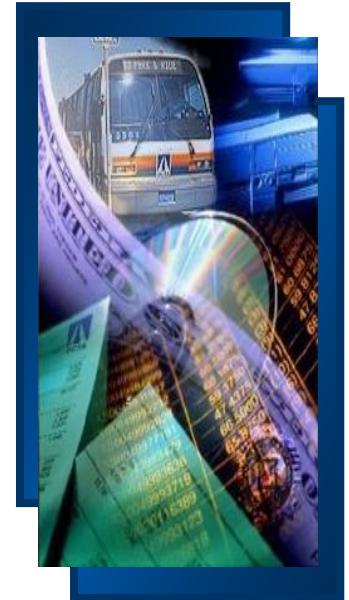
- 
1. Company Name: \_\_\_\_\_
- Attendee: \_\_\_\_\_
- Address: \_\_\_\_\_
- City, State Zip: \_\_\_\_\_
- Phone Number: (       ) \_\_\_\_\_ Registered on CAMM NET? ☐ Yes ☐ No
- E-Mail Address: \_\_\_\_\_
- 
2. Company Name: \_\_\_\_\_
- Attendee: \_\_\_\_\_
- Address: \_\_\_\_\_
- City, State Zip: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

# Pre-Proposal Conference for RFP 3-2944: Harbor Boulevard Pilot Innovative Transit Signal Priority Study



# Agenda

- Introductions
- Safety/Emergency Evacuation
- Online Business and Networking Tools
- Key Procurement Information & Dates
- Review of RFP Documents
- Scope of Work
- Questions and Answer



# 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/>
- Disadvantaged Business Enterprise (DBE) Program
  - <https://cammnet.octa.net/dbe-accordion/>

# Key Procurement Dates

Written Questions Due:

December 8, 2023

OCTA Responds:

December 12, 2023

Proposals Due:

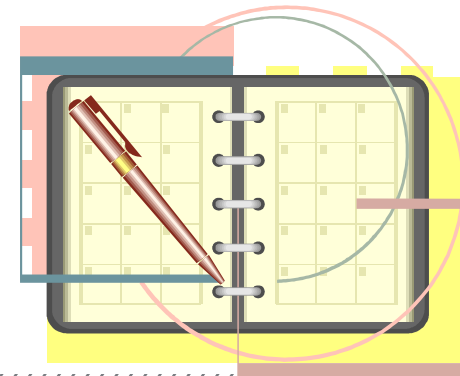
December 20, 2023, 2:00 PM

Interviews:

January 18, 2024

Board of Directors:

March 11, 2024



# Key Procurement Information

- All questions/contact with Authority staff should be directed to the assigned Contract Administrator, Megan Bornman
- Next Addendum will contain a copy of the Pre-Proposal sign-in sheet
- Award based on prime-sub relationship, not joint ventures
- Contract term is for 2-year term
- Funded with Strengthening Mobility and Revolutionizing Transportation (SMART) Grants Program and Regional Early Action Planning Grants of 2021 (REAP 2.0) administered by the Southern California Association of Governments.



# Guidelines for Written Questions

- Questions must be submitted directly to Megan Bornman, Contract Administrator, in writing, by: **December 8, 2023, 5:00 p.m.**
- E-mail recommended: [mbornman@octa.net](mailto:mbornman@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 today are non-binding

Next...  
Proposal Instructions

Followed by...  
Review of Scope of Work

# Proposal Submittal Instructions

- Proposals are due by 2:00 p.m., December 20, 2023
- Proposals are to be submitted to the address specified in the RFP
- Submit **one (1) original proposal** sealed and clearly identified on exterior of package as specified in the RFP.
- Proposers shall also include **one (1) electronic copy** of their submittal package in PDF format on a CD, DVD, or flash drive.
- Proposal package to be clearly marked with RFP number and title

# 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 Content

- Letter of Transmittal
- Technical Proposal
  - a) Qualifications, related experience and references of Offeror
  - 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 – Campaign Contribution Disclosure Form
- Exhibit E – Status of Past and Present Contracts
- Exhibit F – Restrictions on Lobbying
- Exhibit G – Level 1 Safety Specifications (not submitted with proposal)
- Exhibit H – Proposal Exceptions and/or Deviations
- Certification of Restrictions on Lobbying
- Exhibit I – Prohibition on Conducting Restricted Business Operations in Sudan - Certification
- Exhibit J – Prohibition on Contracting with Entities Engaging in Certain Activities or Transactions Relating to Iran – Representation and Certification
- Exhibit K – Iran Contracting Certification

*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	25%
Work plan	30%
Cost and Price	25%

- Evaluation Committee comprised of internal OCTA staff and external members



# Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interview
- Interviews are scheduled for **January 18, 2023**
- Offerors are requested to keep this date available

# Award

- Award Process

- Evaluation Committee recommends highest ranking Offeror to the Regional Transit Planning (RTP) Committee
- The RTP Committee makes recommendation to Board of Directors (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 (Exhibit C) so you are aware of the contractual requirements of the solicitation
- Exceptions
  - Any exceptions/deviations must be identified in Exhibit H – Proposal Exceptions and/or Deviations Form and submitted with the



# Proposed Agreement

- Offerors are encouraged to review:
  - Article 3 - Scope of Work
  - Article 4 - Term of Agreement
  - Article 5 - Allowable Costs and Payment (Firm-fixed)
  - Article 7- Maximum Obligation
  - Article 10 – Insurance
  - Article 31 - Conflict of Interest
  - Article 32 - Code of Conduct

# Scope of Work

Alicia Yang  
Project Manager

*Project Overview and Scope of Work*

# Background

## Project Development

Orange County signals have the capability for more advanced operations

OCTA buses have been sharing location in real-time

Continued advancement in ITS and TSP

Available funding focused on technology and infrastructure

## Project Funding

80% by US DOT's Strengthening Mobility and Revolutionizing Transportation (SMART) Grants Program

20% by SCAG's Regional Early Action Planning (REAP) 2.0 Grants Program

# Project Area

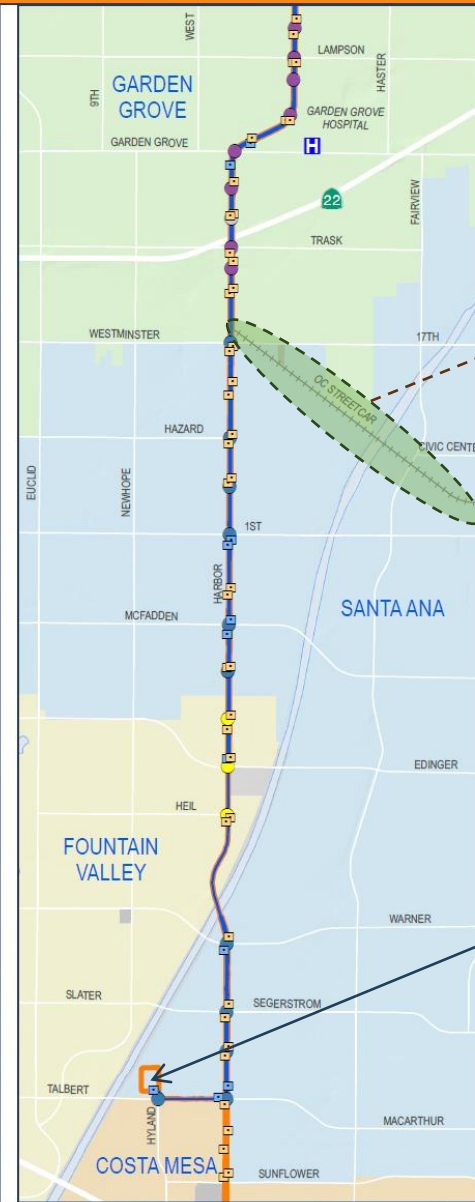
Fullerton Transit Center

Prototype Area  
(9 signalized intersections)



OC Streetcar

OCTA Santa Ana Base



# Scope of Work

Collect and assess existing conditions

Deploy innovative solutions in prototype area

Evaluate and analyze new technology solutions

Prepare Conceptual Plan to scale up

Develop Implementation Plan for entire corridor



# Additional Considerations



## Funding Requirements

Reporting and documentation  
Timely use of funds deadlines  
Metrics for success



## Cybersecurity

Data access, storage, and ownership  
Data sharing with multiple agencies



## Scalability

Varying agency systems  
Stakeholder expectations  
Operations and maintenance

- Questions?



# 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/>

- Reminder.... Proposals are due @ 2:00 pm on December 20, 2023.
- Please submit a completed sign in sheet.
- Please register on CAMM NET.
- Thank you for your interest in OCTA! Feel free to stay and network.