

February 15, 2024

NOTICE TO OFFERORS

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) 3-3068 "Medical Clinic 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., February 26, 2024.**

Offerors are advised of the following:

- 1. A pre-proposal conference was held both on-site/in-person and via teleconference on February 7, 2024. The pre-proposal registration sheet are presented as Attachment A and the presentation is presented as Attachment B to this Addendum No. 2.
- 2. The Safety Specifications requirement has been revised and is presented as Exhibit F, <u>Level 1</u> Standard Health, Safety and Environmental Specifications, attached to this Addendum No. 2.
- 3. The following are responses to written questions received on or before 5:00 p.m. on February 9, 2024 as stated in the RFP package.

Question 1: Can you please provide additional information on what type of Occupational Medicine and Therapy are needed?

Response 1: Please reference the Scope of Work (Exhibit A) as provided in the RFP.

Question 2: What is required in the FCE, portion of the exam?

Response 2: In the Functional Capacity Exam portion, all respirator-wearing personnel shall have a medical evaluation to determine their ability to use a respirator.

Question 3: Is the FCE a requirement in conjunction with every DOT exam?

Response 3: No. Only on an as-needed basis.

Question 4: Does OCTA do FCE exams without a DOT exam?

Response 4: Yes.

Question 5: What are the dimensions of the chair?

Response 5: Approximate width x length: 4' x 3'.

Question 6: Would the inability to store a bus operator chair disqualify the bidder or would it significantly reduce the opportunity to be awarded a contract?

Response 6: No.

Question 7: Will there be multiple providers awarded a contract and if yes, is there a maximum number of providers that can be awarded?

Response 7: OCTA anticipates contract award to only one (1) provider. However, OCTA reserves the right to award its total requirements to one (1) Offeror or to apportion those requirements among several Offerors as OCTA may deem to be in its best interest.

Question 8: Can you provide a sample OCTA authorization form?

Response 8: For the Scope of Work, Part A – Please reference Attachment C to this Addendum No. 2.

For the Scope of Work, Part B – Authorization Forms will be provided upon contract award.

Question 9: Would OCTA be open to use the provider's forms, if they have the required information that is on the OCTA forms?

Response 9: For the Scope of Work, Part A – Yes. To be further discussed.

For the Scope of Work, Part B – No. The provider shall use the Authorization forms provided by OCTA. The provider must supply all other forms related to alcohol and drug testing.

Question 10: Can OCTA provide copies of all forms, created or specific to OCTA, which will be needed to fulfill the contractual obligations of this RFP?

Response 10: For the Scope of Work, Part A – Attachment C to this RFP is one (1) form. All other documentation will be provided upon contract award.

For the Scope of Work, Part B – Authorization Forms will be provided upon contract award. All other forms shall be supplied by the provider.

Question

11: Which exams and services would OCTA want to be done using a mobile health vehicle, since a bus operator chair will not be accessible?

Response 11: The DOT physical examination and certificate would be done using a mobile health vehicle. For example, at a career/hiring fair. Upon further review, the chair would not be necessary in this case.

Question

12: Can you provide a breakdown of the average number of exams by category for all services within this RFP by month and/or year?

Response 12: For the Scope of Work, Part A – An average of thirty-six (36) DOT exams with certificates per month and nine (9) DOT exams without certificates per month. An average of two (2) audiograms and two (2) pulmonary exams per month. An average of one (1)-two (2) vaccinations per year. These numbers are based on previous experience and may not reflect future requirements. Provider is expected to adjust their resources and capabilities as needed to maintain performance standards.

For the Scope of Work, Part B – An average of four (4) alcohol and drug tests per day with a range of eighteen (18) to zero (0) per day. These numbers are based on previous experience and may not reflect future requirements. Provider is expected to adjust their resources and capabilities as needed to maintain performance standards.

Question

13: Would the inability to provide 24-hour drug and alcohol testing disqualify the bidder, or would it significantly reduce the opportunity to be awarded a contract?

Response 13: Offerors submitting proposals shall be able to meet all requirements listed in the Scope of Work Part A and B.

Question 14: Would not having a web-based employer portal disqualify the bidder, or would it significantly reduce the opportunity to be awarded a contract?

Response 14: Offerors submitting proposals shall be able to meet all requirements listed in the Scope of Work Part A and B. A request for an Exception/Deviation may be submitted along with the proposal using Exhibit G of the RFP document. OCTA will then review the exception/deviation and assign it a PASS/FAIL determination.

Question 15: Would the inability to deliver all original test forms with the invoice disqualify the bidder, or would it significantly reduce the opportunity to be awarded a contract?

Response 15: Offerors submitting proposals shall be able to meet all requirements listed in the Scope of Work Part A and B. A request for an Exception/Deviation may be submitted along with the proposal using Exhibit G of the RFP document. OCTA will then review the exception/deviation and assign it a PASS/FAIL determination.

Question 16: Would a bidder be disqualified, or would it significantly reduce the opportunity to be awarded a contract, if unable to meet hours and days of availability required within the RFP?

Response 16: Offerors submitting proposals shall be able to meet all requirements listed in the Scope of Work Part A and B.

Question 17: Would the bidder be disqualified, or would it significantly reduce the opportunity to be awarded a contract, if they are unable to provide average wait time and/or logs and records required under the Physical Exam, section 7 of the RFP?

Response 17: Offerors submitting proposals shall be able to meet all requirements listed in the Scope of Work Part A and B. A request for an Exception/Deviation may be

submitted along with the proposal using Exhibit G of the RFP document. OCTA will then review the exception/deviation and assign it a PASS/FAIL determination.

Question

18: Would the bidder be disqualified, or would it significantly reduce the opportunity to be awarded a contract, if they are unable to agree to performance standards or reimbursement for drug screens based on performance standards?

Response 18:

Offerors submitting proposals shall be able to meet all requirements listed in the Scope of Work Part A and B. A request for an Exception/Deviation may be submitted along with the proposal using Exhibit G of the RFP document. OCTA will then review the exception/deviation and assign it a PASS/FAIL determination.

Question

19: Would OCTA be open to mutually agreeable auditing that ensures HIPAA standards are met?

Response 19:

Offerors submitting proposals shall be able to meet all requirements as listed. A request for an Exception/Deviation may be submitted along with the proposal using Exhibit G of the RFP document. OCTA will then review the exception/deviation and assign it a PASS/FAIL determination.

Question 20: Who is the incumbent?

Response 20: Akeso Occupational Health

Question 21: Can we have a subcontractor that bills directly?

Response 21: The provider is solely responsible for managing all matters including subcontractor billing performance issues. Subcontractor operations shall be transparent to OCTA and OCTA shall communicate only with the provider.

Question

22: Do you need Random Program management? If so, how often is the pull?

Response 22: No.

Question 23: As referenced under Section I, Instructions to Offerers, subsection M, may we please have a copy or link to the Authority's Code of Conduct?

Response 23: OCTA's Code of Conduct is available at www.octa.net.

Question 24: With regards to Exhibit F, Level 2 Standard Health, Safety and Environmental Specifications, can you please help us to understand how this applies to this RFP, are we required to designate a health and safety representatives as outlined in section G, "the contractor within 10 business health days shall designate а and safety representative...shall hold a current certification from the Board of Certified Safety Professional and have five years of demonstrated construction/scope experience enforcing HSE compliance on construction, industrial or similar project scopes."?

Response 24: The Safety Specifications requirement has been revised and is presented as Exhibit F, <u>Level 1</u>
Standard Health, Safety and Environmental Specifications, attached to this Addendum No. 2.

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 <u>jle@octa.net</u>.

Sincerely, *Gackie Le*

Jackie Le

Senior Contract Administrator

Contracts Administration and Materials Management

PRE-PROPOSAL/PRE-BID CONFERENCE REGISTRATION



Addendum No. 2 to RFP 3-3068
Attachment A

RFP/IFB #: **RFP 3-3068**

Date and Time: February 7, 2024 @ 11:00am

Title: Medical Clinic Services

1.	Company Name: AK-SU OCCUPATIONAL HEALTH
	Attendee: 1 (h Nich. Son, Van Drung
	Address: 7700 ruine Center Dave I Snite 870
	City, State Zip:
	Phone Number: (2/3) 932 97// Registered on CAMM NET? Yes \(\subseteq \text{No}
	Prime Sub DBE Dosh . nielsun @ akesumedical. com
2.	Company Name:
۷.	
	Attendee:
	Address:
	City, State Zip:
	Phone Number: Registered on CAMM NET? Yes No
	Prime Sub DBE D
	E-Mail Address:
3.	Company Name:
	Attendee:
	Address:
	City, State Zip:
	Phone Number: Registered on CAMM NET? Yes No
	Prime Sub DBE D
	E-Mail Address:

Pre-Proposal Conference

RFP 3-3068 Medical Clinic Services





Agenda

- Introductions
- Safety/Emergency Evacuation
- Vendor Registration and Resources
- Key/Procurement/Information/&/Dates
- Scope of Work
- RFP/Documents/Overview
- Questions and Answer



CAMM NET Registration

https://cammnet.octa.net/

Online Business & Networking Tools Attachment B

CAMM NET Connect

https://www.facebook.com/CammnetConnect

Working with Authority

https://cammnet.octa.net/about-us/working/

Planholder's List

+/https://cammnet.octa/net/procurements/planholders-list-selection/

Vendor Video Training

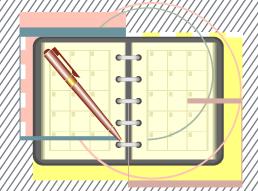
- How to Submit a Responsive Proposal to an RFP
- Developing a Winning Proposal
 - Both videos/available/at/https://cammnet.octa/net/vendor-training/

Key Procurement Dates

Written Questions Due: February 9, 2024, 5:00 p.m.

Authority Responds: February 16, 2024

Proposals Due: February 26, 2024, 2:00 p.m.



Key Procurement Information

- All questions/contact with Authority staff should be directed to me
- Award based on prime-sub relationship, not joint ventures
- Contract term: a 3-year Initial term, and two 1-year option term

Guidelines for Written Questions

- Questions must be submitted directly to Jackie Le, Senior Contract Administrator, in writing, by: **February 9, 2024, 5:00 p.m.**
- E-mail: <u>ile@octa.net</u>
- 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

Medical Clinic Services

Overview and Scope of Work

Presented by

Bea Maselli & Steve Elkins

Overview

- Ø Garden Grove Base: 1/1800 Woodbury Rd, Garden Grove, CA/92863
- Santa Ana Base: 4301 W. MacArthur Blvd, Santa Ana, CA 92704
- Part B Drug and Alcohol Testing (presented by Steve)

Scope of Work – Part A

- Monday-Friday: 8:00 a.m. 6:00 p.m.
- \(\lambda \text{Weekends: \(\seta \text{Saturdays and \(\text{on-call'} \) \the \(\text{remainder \) \(\text{of \text{the weekend.} } \)

Scope of Work – Part B

Part B – Drug and Alcohol Testing

- Walk-in full-service drug and alcohol testing
 - No appointments required
- Clinic must be available to provide all services 24/7/365 days
- Payment is based on each test performed in compliance with the Performance Standards, but
 payment may be forfeited for non-compliant tests.
- Attachment D Outlines the Performance Standards that ensures efficient and accurate testing
 // service operations, emphasizing regulatory compliance and timely communication.

Next...

Proposal/Instructions/

Proposal Submittal Instructions

- Proposals are due by 2:00 p.m., February 26, 2024
- Proposals must be submitted, electronically, through the URL link in the RFP.
- For technical issues with uploading proposals, please contact the Senior Contract Administrator prior to the proposal submission deadline.

Proposal Submittal Instructions (continued)

- Authority has the right to:
 - accept or reject any and all proposals;
 - -withdraw/or/cancel/the/RFP;
 - —postpone proposal opening.
- Proposals received are considered public information
- Proposals are not to be copyrighted

Proposal Content

- Letter of Transmittal
- Technical Proposal
 - 1) Qualifications, related experience and references of Offeror
 - 2)//Proposed/staffing/and/project/organization/
 - 3)/Work plan
 - 4)/Exceptions//Deviations/(Technical/vs/Contractual)

Proposal Content

Forms

- Exhibit A Scope of Work (not needed with proposal)
- ❖Exhibit B Price Summary Sheet
- Exhibit C Proposed Agreement (not needed with proposal)
- Exhibit D Status of Past and Present Contracts
- ★Exhibit E / Campaign Contributions Disclosure
- Exhibit F Level 2 Safety Specifications (not needed with proposal)
- Exhibit G Proposal Exceptions and/or Deviations

❖//These/(Exhibits)/Forms/must/be/signed/and/submitted/in/yout/proposal/

^{*/}Forms/submitted/with/proposal/are/excluded/from/50-page/limit/

Proposal Content - Forms

- Exhibit B "Price Summary Sheet"
 - Submit proposed pricing to provide services described in Exhibit A, Scope of Work
 - Required to be returned with proposal
 - Complete and sign the "Price Summary Sheet" form included with this RFP (Exhibit B)

Exhibit C – Proposed Agreement

- Read the entire document for contractual requirements
- Offerors are encouraged to review:
 - Article 3 Scope of Work
 - Article 4 Term of Agreement
 - Article 5 Payment (Time and Expense)
 - Article 6 Maximum Obligation

 - (a) // Article 17 Conflict of Interest/Prohibitions
 - Article/18 Code of Conduct
- /-// Any exceptions or deviations need to be detailed on Exhibit G



Proposed Contents - Forms

Required to be returned with Proposal

- ❖Exhibit B Price Summary Sheet
- ❖ Exhibit D Status of Past and Present Contracts
- Exhibit E // Campaign Contribution Disclosure
- Exhibit G Proposal Exceptions and/or Deviations
 - Any exceptions/deviations must be detailed here
- If there is nothing to report on these Forms, please mark "N/A," sign and return with Proposal

Evaluation and Award

 Proposals received, as instructed in the RFP, will be evaluated using the following <u>evaluation criteria</u>:

/////Qualifications/of/the/firm///////////////////////////////////	////////////// 2 9%/
///// Staffing and project organization////	25%
Mork plan	35%
//////////////////////////////////////	20%

Evaluation and Award (continued)

"Short-Listed" firms will be invited to the interview

- Interviews are scheduled for <u>(an in person)</u> <u>March 14, 2024</u>
- Offerors are requested to keep this date available

Award

- Award Process
 - Evaluation Committee selects highest ranking Offeror for award.
 - All firms submitting a proposal will be notified of Award via

CAMM NET

Questions?

• Reminder: today's discussions are non-binding



Reminders...

- Proposals are due @ 2:00 pm on February 26, 2024
- Proposal/and/Forms/(Exhibits/B,/D,/E,/G)/need/to/be/completed/and/signed/
- Register on CAMM NET
- Leave a business card

Thank you for your interest in Orange County Transportation Authority!



Attachment C MEDICAL EXAM / EVALUATION

Addendum No. 2 to RFP 3-3068

AUTHORIZATION FORM

1. AUTHORIZING OCTA REPRESENTATIVE - COMPLETE THIS FORM. 2. EMPLOYEE - SIGN AND DATE AT BOTTOM.

M05500 OCTA AUTH#:

THIS IS NOT A DRUG AND ALCOHOL TEST AUTHORIZATION FORM. SEPARATE FORM REQUIRED.

OCTA REPRESENTATIVE AUTHORIZING THIS EXAM / EVALUATION					
Badge #: Print Name:	Signature:	Date:			
MEDICAL EXAM / EVALUATION TYPE					
DMV Physical Exam					
Pre-Employment Physical Exam					
Hepatitis B Vaccination / Titer					
Audiometric Evaluation					
Respiratory Protection Medical Evaluation					
Fit for Duty Exam					
Bi-Annual Physical Exam					
Other Specify:					
OCTA EMPLOYEE					
Badge #:Print Name:		Date of Birth:			
Job Title: Work Location:					
Report to (Clinic Name):					
Date Sent to Clinic: Time Sent to Clinic (24H):					
Employee Signature: X	Date:	X			

WHITE/ORIGINAL - OCTA Copy

YELLOW - Employee Copy

LEVEL 1 HEALTH, SAFETY AND ENVIRONMENTAL SPECIFICATIONS

PART I - GENERAL

- 1.1 GENERAL HEALTH, SAFETY & ENVIRONMENTAL REQUIREMENTS
 - A. The Contractor, its subcontractors, suppliers, and employees have the obligation to comply with all Authority health, safety and environmental compliance department (HSEC) requirements of this safety specification, project site requirements, bus yard safety rules, as well as all federal, state, and local regulations pertaining to scope of work, contracts or agreements with the Authority. Additionally, manufacturer requirements are considered incorporated by reference as applicable to this scope of work.
 - B. Observance of repeated unsafe acts or conditions, serious violation of safety standards, non-conformance of Authority health, safety and environmental compliance department (HSEC) requirements, or disregard for the intent of these safety specifications to protect people and property, by Contractor or its subcontractors may be cause for termination of scope or agreements with the Authority, at the sole discretion of the Authority.
 - C. The health, safety, and environmental requirements, and references contained within this scope of work shall not be considered all-inclusive as to the hazards that might be encountered. Safe work practices shall be planned and performed, and safe conditions shall be maintained during this work scope.
 - D. The Authority Project Manager shall be responsible to ensure a safety orientation is conducted of known potential hazards and emergency procedures for all Contractor personnel, subcontractors, suppliers, vendors, and new employees assigned to the project prior to commencement of the project.
 - E. The Contractor shall ensure that all Contractor vehicles, including those of its subcontractors, suppliers, vendors and employees are parked in designated parking areas, and comply with traffic routes, and posted traffic signs in areas other than the employee parking lots.
 - F. California Code of Regulations (CCR) Title 8 Standards are minimum requirements; each Contractor is encouraged to exceed minimum requirements. When the Contractor's safety requirements exceed statutory standards, the more stringent requirements shall be applied for the safeguard of public and employees.

1.2 REGULATORY

A. Injury/Illness Prevention Program
The Contractor shall comply with CCR Title 8, Section with California Code of
Regulations (CCR) Title 8, Section 3203. The intent and elements of the IIPP shall
be implemented and enforced by the Contractor and its sub-tier contractors,
suppliers, and vendors. The program shall be provided to the Authority's Project
Manager, upon request, within 72 hours.

B. Substance Abuse Prevention Program

Contractor shall comply with the Policy or Program of the Company's Substance Abuse Prevention Policy that complies with the most recent Drug Free Workplace Act. The program shall be provided to the Authority's Project Manager, upon request, within 72 hours.

C. Heat Illness Prevention Program

Contractor shall comply with CCR Title 8, Section, Section 3395, Heat Illness Prevention. The program shall be provided to the Authority's Project Manager, upon request, within 72 hours.

- D. Hazard Communication Program
 - Contractor shall comply with CCR Title 8, Section 5194 Hazard Communication Standard. Prior to use on Authority property and/or project work areas Contractor shall provide the Authority Project Manager copies of SDS for all applicable chemical products used, if any. The program shall be provided to the Authority's Project Manager, upon request, within 72 hours.
 - a. All chemicals including paint, solvents, detergents and similar substances shall comply with South Coast Air Quality Management District (SCAQMD) rules 103, 1113, and 1171.
- E. Storm Water Pollution Prevention Plan

The Contractor shall protect property and water resources from fuels and similar products throughout the duration of the contract. Contractor shall comply with Storm Water Pollution Prevention Plan (SWPPP) requirements. The program or plan if required by scope shall be provided to the Authority's Project Manager, upon request, within 72 hours.

1.3 INCIDENT NOTIFICATION AND INVESTIGATION

- A. The Authority shall be promptly notified of any of the following types of incidents including but not limited to:
 - 1. Damage incidents of property (incidents involving third party, contractor or Authority property damage);
 - 2. Reportable and/or Recordable injuries (as defined by the U. S. Occupational Safety and Health Administration), a minor injury, and near miss incidents;
 - 3. Incidents impacting the environment, i.e. spills or releases on Authority projects or property.
 - Outside Agency Inspections; agencies such as Cal/OSHA, DTSC, SCAQMD, State Water Resources Control Board, FTA, CPUC, EPA, USACE and similar agencies.
- B. Notifications shall be made to Authority representatives, employees and/or agents. This includes incidents occurring to contractors, vendors, visitors, or members of the public that arise from the performance of Authority contract work. An immediate verbal notice followed by an initial written incident investigation report shall be submitted to the Authority's Project Manager within 24 hours of the incident.

- C. A final written incident investigative report shall be submitted within seven (7) calendar days and include the following information. The Current Status of anyone injured, photos of the incident area, detailed description of what happened, Photos of the existing conditions and area of the injury/incident, the contributing factors that lead to the incident occurrence, a copy of the company policy or procedure associated with the incident and evaluation of effectiveness, copy of task planning documentation, copy of the Physician's first report of injury, copy of Cal/OSHA 300 log of work related injuries and illnesses, the Cal/OSHA 301 Injury Illness Incident Report, and corrective actions initiated to prevent recurrence. This information shall be considered the minimum elements required for a comprehensive incident report provided to OCTA.
- D. A Serious Injury, Serious Incident, OSHA Recordable Injury/Illness, or a Significant Near Miss shall require a formal incident review at the discretion of the Authority's Project Manager. The incident review shall be conducted within seven (7) calendar days of the incident. This review shall require a company senior executive, company program or project manager from the Contractors' organization to participate and present the incident review as determined by the OCTA Project Manager. The serious incident presentation shall include action taken for the welfare of the injured, a status report of the injured, causation factors that lead to the incident, a root cause analysis (using 5 whys and fishbone methods), and a detailed recovery plan that identifies corrective actions to prevent a similar incident, and actions to enhance safety awareness.
 - 1. <u>Serious Injury:</u> includes an injury or illness to one or more employees, occurring in a place of employment or in connection with any employment, which requires inpatient hospitalization for a period in excess of twenty-four hours for other than medical observation, or in which an employee suffers the loss of any member of the body, or suffers any serious degree of physical disfigurement. A serious injury also includes a lost workday or reassignment or restricted injury case as determined by the Physician's first report of injury or Cal/OSHA definitions.
 - Serious Incident: includes but not limited to property damage of \$500.00 or more, an incident requiring emergency services (local fire, paramedics and ambulance response), news media or OCTA media relations response, and/or incidents involving other agencies (Cal/OSHA, EPA, AQMD, DTSC, Metrolink, FTA, FRA etc.) notification or representation.
 - 3. OSHA Recordable Injury / Illness: includes and injury / illness resulting in medical treatment beyond First Aid, an injury / illness which requires restricted duty, or an injury / illness resulting in days away from work.
 - 4. <u>Significant Near Miss Incident;</u> includes incidents where no property was damaged and no personal injury sustained, but where, given a slight shift in time or position, damage and/or injury easily could have occurred.

1.4 DESIGNATED HEALTH AND SAFETY REPRESENTATIVE

A. Upon contract award, the contractor within 10 business days shall designate a health and safety representative and provide a resume and qualifications to the Authority project manager, upon request, within 72 hours.

B. This person shall be a competent or qualified individual as defined by the Occupational, Safety, and Health Administration (OSHA), familiar with applicable CCR Title 8 Standards (Cal/OSHA) and has the authority to affect changes in work procedures that may have associated cost, schedule and budget impacts.

1.5 PERSONAL PROTECTIVE EQUIPMENT

- A. The Contractor, its subcontractors, suppliers, and employees are required to comply with applicable personal protective equipment (PPE) requirements while performing work at any Authority project or property. Generally minimum PPE requirements include eye protection; hearing protection, head protection, class 2 or 3 safety reflective vests, and appropriate footwear.
- B. The Contractor, its subcontractors, suppliers, and employees are required to provide their own PPE, including eye, head, foot, and hand protection, safety vests, or other PPE required to perform their work safely on Authority projects or property. The Authority requires eye protection on construction projects and work areas that meet ANSI Z-87.1 Standards.

1.6 REFERENCES

- A. CCR Title 8 Standards (Cal/OSHA)
- B. FCR Including 1910 and 1926 Standards
- C. NFPA, NEC, ANSI, NIOSH Standards
- D. Construction Industry Institute (CII)
- E. OCTA Yard Safety Rules

END OF SECTION