



February 20, 2024

**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) 4-2076  
“On-Call Planning Studies Public Outreach Consultant 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., March 13, 2024**.

A pre-proposal conference is scheduled on-site/in-person and via teleconference on February 22, 2024 at 3:30 p.m. Offerors are advised that the location for the pre-proposal conference is updated as follows:

- 600 South Main Street, Orange, California, 92868
- Conference Room Number 09.

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

- [Click here to join the meeting](#)
- OR Call-in Number: 916-550-9867
- Conference ID: 232 258 334#

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](mailto:lmartinez1@octa.net) no later than 5:00 p.m., February 22, 2024.

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](mailto:lmartinez1@octa.net).

Sincerely,

*Luis Martinez*

Luis Martinez  
Senior Contract Administrator  
Contracts Administration and Materials Management

**PRE-PROPOSAL/PRE-BID CONFERENCE REGISTRATION**

RFP #: 4-2076

Date: February 22, 2024

Title: On-Call Planning Studies Public Outreach Consultant Services

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1. 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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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

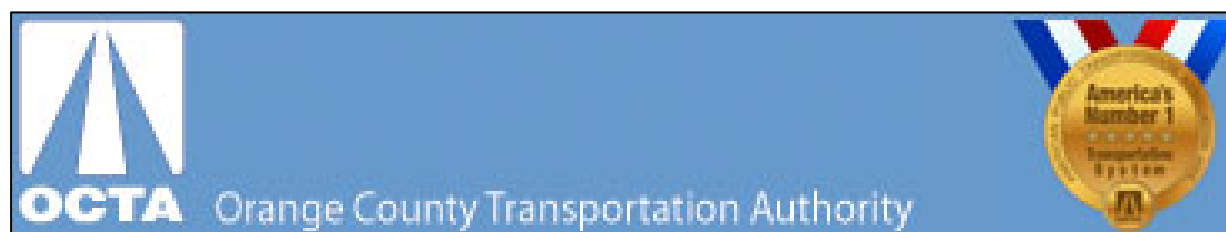
Prime ☐ Sub ☐ DBE ☐

E-Mail Address: \_\_\_\_\_

# Pre-Proposal Conference

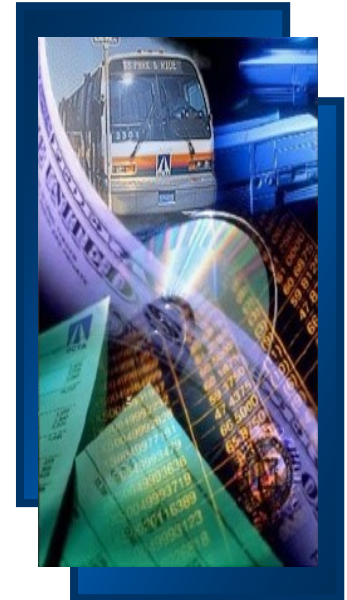
## RFP 4-2076

### On-Call Planning Studies Public Outreach Consultant Services



# Agenda

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



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

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

# Online Business & Networking Tools

ATTACHMENT B

## CAMM NET Connect

- <https://www.facebook.com/CammnetConnect>

## Working with Authority

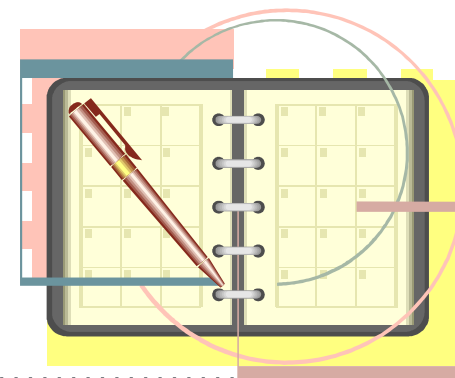
- <https://cammnet.octa.net/about-us/working/>

## Planholder's List

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

# Key Procurement Dates

Written Questions Due:	February 26, 2024, 5:00 p.m.
Authority Responds:	February 28, 2024
Proposals Due:	March 13, 2024, 2:00 p.m.
Interviews:	April 2, 2024





# Key Procurement Information

- All questions/contact with Authority staff should be directed to Luis Martinez, Senior Contract administrator
- Next Addendum will contain a copy of the Pre-Proposal sign-in sheet
- Award based on prime-sub relationship, not joint ventures
- ❖ Contract term: a three-year Initial term with one, two-year option term

# Guidelines for Written Questions

- Questions must be submitted directly to Luis Martinez, Senior Contract Administrator, in writing, by: **February 26, 2024, 5:00 p.m.**
- E-mail: [lmartinez1@octa.net](mailto:lmartinez1@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., March 13, 2024
  - 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. 14 and Exhibit B.**
- Proposals and supplemental information received after the date and time specified above will be rejected.

# 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 Submittal Instructions (continued)

ATTACHMENT B

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

# 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)

## Exhibits and Forms

- Exhibit A – Scope of Work (not submitted with proposal)
- ❖ Exhibit B – Price Summary Sheet
- Exhibit C – Proposed Agreement (not submitted with proposal)
- ❖ Exhibit D – Status of Past and Present Contracts
- ❖ Exhibit E – Campaign Contributions Disclosure
- Exhibit F – Level 1 Safety Specifications (not submitted with proposal)
- ❖ Exhibit G – Proposal Exceptions and/or Deviations

\* Forms submitted with proposal are excluded from 50-page limit.

❖ These (Exhibits) Forms must be signed and submitted in your proposal.



# Proposal Content (continued)

## ❖ Exhibit B – “Price Summary Sheet”

- 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.

# Proposed Agreement

- Exhibit C – Proposed Agreement
- Please review the Proposed Agreement so you are aware of the contractual requirements of this project
  - 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
    - Article 9 - Insurance
    - Article 17 - Conflict of Interest/Prohibitions
    - Article 18 - Code of Conduct
  - Any exceptions or deviations need to be detailed on Exhibit G



# Evaluation and Award

- Proposals received, as instructed in the RFP, will be evaluated using the following evaluation criteria:
  - Qualifications of the firm 25%
  - Staffing and project organization 30%
  - Work plan 20%
  - Cost & Price 25%

# Evaluation and Award (continued)

- “Short-Listed” firms will be invited to the interview
- Interviews are scheduled for **April 2, 2024**
- Offerors are requested to keep this date available

# Award

- Award Process
  - Evaluation Committee recommends highest ranking Offeror to Legislative and Communications (L&C) Committee.
  - L&C 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.

# Scope of Work

Project Overview

# Scope of Work Overview

- Seeking on-call consultant to plan and execute public engagement for multiple transportation planning studies
- Strong understanding of Orange County transportation and the various communities that are represented in the county
- Upcoming studies in 2024
  - Fullerton Park and Ride Joint Development Study
  - Mobility Hubs Concept of Operations Study
  - Reconnecting Communities Through Complete Streets Study
  - Bikeways Connectivity Study

# Scope of Work – Outreach Tactics

- Virtual and in-person outreach
- Public webinars, pop-ups
- Policy, stakeholder and technical committees roundtable
- Digital media
- Diversity and CBO outreach
- Online surveys
- State-of-the-art public engagement tools
- Collateral development



## Questions?

- Reminder: today's discussions are non-binding



## Reminders...

- Proposals are due @ **2:00 pm on March 13, 2024**
- Register on CAMM NET
- Leave a business card
- Please submit your pre-proposal sign-in sheets

Thank you for your interest in Orange County Transportation Authority!