



NOTICE TO OFFERORS

March 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 Proposal (RFP) 4-2080
"Pacific Surfliner Marketing Services"**

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 **2:00 p.m., April 9, 2024**.

A pre-proposal conference will be held both on-site/in-person and via teleconference on March 26, 2024, at 2:00 p.m.

For prospective Offerors who wish to join on-site/in-person, the pre-proposal conference will be held at the Authority's Administrative Office, 550 South Main Street, Orange, California, in Conference Room 08.

Prospective Offerors not attending in-person may join or call-in using the following credentials:

- [Click here to join the meeting](#)
- OR Call-in Number: 916-550-9867
- Conference ID: 653759346#

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 pre-proposal registration sheet (Attachment A) and email it to the undersigned at gtorres@octa.net, no later than 1:00 p.m., March 25, 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 gtorres@octa.net.

Sincerely,

Gina Torres

Contract Administrator

Contracts Administration and Materials Management

Orange County Transportation Authority

550 South Main Street / P.O. Box 14184 / Orange / California 92863-1584 (714) 560-OCTA (6282)



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: **4-2080**

Date: **March 26, 2024**

Title: **Pacific Surfliner Marketing 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: _____

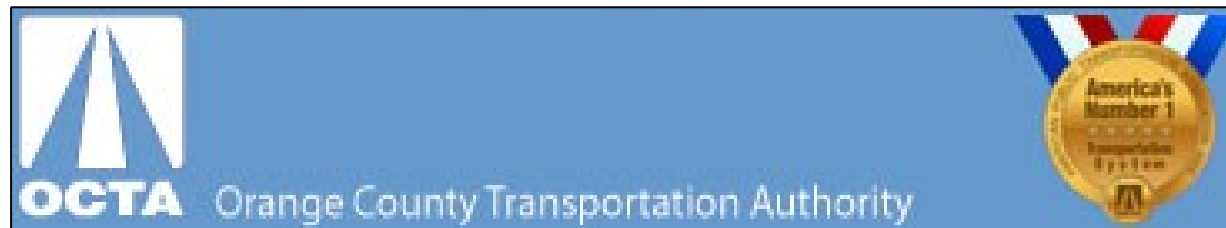
Phone Number: () _____ Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐ DBE ☐

E-Mail Address: _____

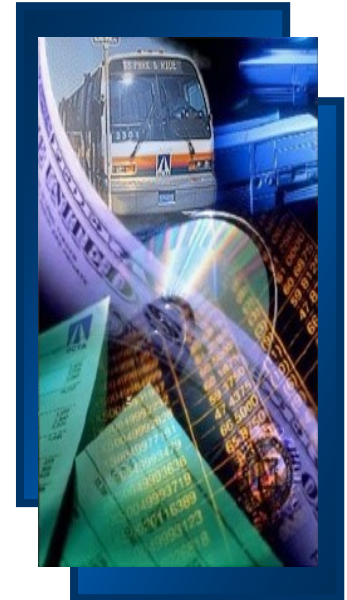
Pre-Proposal Conference for **RFP 4-2080**

“LOSSAN Pacific Surfliner Marketing Services”



Agenda

- Introductions
- Purpose of Pre-Proposal Conference
- Online Business and Networking Tools
- Key Procurement Information & Dates
- Review of RFP Documents
- Scope of Work
- Questions and Answers Session
- Closing



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

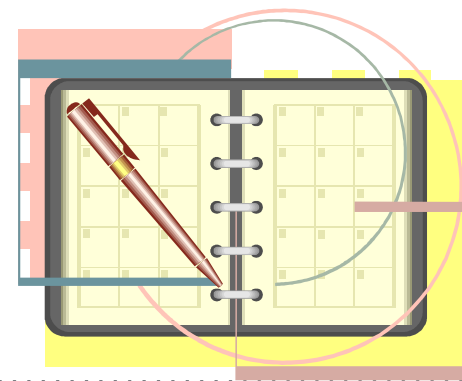
- CAMM NET Connect
 - <https://www.facebook.com/CammnetConnect>
- Working with OCTA
 - <https://cammnet.octa.net/about-us/working/>
- Planholder's List
 - <https://cammnet.octa.net/procurements/planholders-list-selection/>

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:	March 27, 2024, 2:00 PM
OCTA Responds:	April 2, 2024
Proposals Due:	April 9, 2024, 2:00 PM
Interviews:	May 7, 2024
LOSSAN Board Meeting:	June 17, 2024



Key Procurement Information

- All questions/contact with Authority staff should be directed to Gina Torres, 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 one-year initial term with two, two-year option terms

Guidelines for Written Questions

- Questions must be submitted directly to Gina Torres, Contract Administrator, in writing, by: **March 27, 2024, 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 **April 9, 2024**.
- Proposals are to be submitted to the address specified in the RFP
- Submit **one (1) original copy** 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 Submittal Instructions (continued)

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

Proposal Content

- 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)

Proposal Content (continued)

Forms:

- Exhibit D – Status of Past and Present Contracts
- Exhibit E – Campaign Contributions Disclosure
- Exhibit F – Level 1 Safety Specifications
- Exhibit G - Proposal Exceptions and/or Deviations

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 (continued)

- “Short-Listed” firms will be invited to interviews (if needed).
- Interviews are scheduled for **May 7, 2024**.
- Offerors are requested to keep this date available.

- Award Process
 - Evaluation Committee recommends highest ranking Offeror for Award.
 - BOD may accept/reject the 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 G – Proposal Exceptions and/or Deviations Form and submitted with the proposal.



Evaluation and Award

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

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

- Evaluation Committee is comprised of internal LOSSAN and OCTA staff members

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)

Puja Thomas-Patel

Marketing and Communications Manager, LOSSAN

Project Overview and Scope of Work

- **Los Angeles – San Diego – San Luis Obispo Rail Corridor**
 - 351-mile rail corridor through six counties
 - 2nd busiest Amtrak route in United States (3 million riders/year)
- **AND** –
- **LOSSAN Agency**
 - Manage and administer Amtrak Pacific Surfliner service
 - Administration Support: Orange County Transportation Authority (OCTA)

The LOSSAN Agency utilizes external support to assist with strategic, creative, and technical aspects of marketing for the Pacific Surfliner service.

The role of consultants includes the following:

- Providing expertise in specific service categories
- Supplementing LOSSAN's in-house marketing and communications staff
- Working with external vendors contracted for specific marketing specialties including web services, photography, and other marketing specialties

Overall Goals

- Support with **Field Marketing Efforts** to expand the Agency's brand awareness, relationships, and community interactions.

We're looking for a firm that has:

- A solid understanding of the Pacific Surfliner brand and market position.
- Expertise in targeted, audience specific marketing.
- Knowledge of emerging technology, trends, platforms, and messaging opportunities, and demonstrate the ability to leverage them effectively.
- A thorough understanding of marketing best practices in the transportation and/or tourism industry

Services Required

- Brand Awareness, Advertising, and Partnership Building
- Multi-lingual community outreach and engagement
- Promotional marketing
- Creative services

- Questions?



- Reminders
 - Questions and Answers session closes March 27, 2024, at 2:00 pm
 - Proposals are due @ 2:00 pm on April 9, 2024
 - Please submit the pre-proposal registration sheet
 - Please register on CAMM NET
- Thank you for your interest in OCTA.