



May 13, 2024

**SUBJECT: Request for Proposals (RFP) 4-2110
"Replacement of Fareboxes and Related Fare Collection Equipment"**

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*

All Offerors:

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., June 4, 2024**.

Offerors are advised of the following:

1. The due date for OCTA's responses to written questions has been moved to May 17, 2024. OCTA's responses to written questions will be posted on CAMM NET.
2. A pre-proposal conference was held both on-site/in-person and via teleconference on April 30, 2024 at 10:00 a.m. The pre-proposal registration sheets are presented as Attachment A and the presentation is presented as Attachment B to this Addendum No. 2.

Offerors are reminded to acknowledge receipt of this Addendum No. 2 in their transmittal letter 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 ideneau@octa.net.

Sincerely,

Iris Deneau
Senior Contract Administrator
Contracts Administration and Materials Management

PRE-PROPOSAL CONFERENCE REGISTRATION**OCTA** RFP #: 4-2110

Date: April 30, 2024

Title: Replacement Fareboxes and Related Fare Collection Equipment

-
1. **Company Name:** BEA Transit Technologies, Inc
- Attendee:** Claudio Franco
- Address:** 6790 Embarcadero Lane, Suite 100
- City, State Zip:** Carlsbad, CA, 92011
- Phone Number:** (510) 205 1433 **Registered on CAMM NET?** ☒ Yes ☐ No
- Prime** ☐ **Sub** ☐ **DBE** ☐
- E-Mail Address:** cfranco@beattusa.com
-
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 REGISTRATION**OCTA** RFP #: 4-2110

Date: April 30, 2024

Title: Replacement Fareboxes and Related Fare Collection Equipment

1. Company Name: MIKROELEKTRONIKA SPOL. S.R.O.
- Attendee: C. Andrés Barona
- Address: Dráby 849
- City, State Zip: Vysoké Mýto - 566 01
- Phone Number: (+420) 602370916 Registered on CAMM NET? ☐ Yes ☒ No
- Prime ☒ Sub ☐ DBE ☐
- E-Mail Address: c.barona@mikroelektronika.cz

PRE-PROPOSAL CONFERENCE REGISTRATION**OCTA** RFP #: 4-2110

Date: April 30, 2024

Title: Replacement Fareboxes and Related Fare Collection Equipment

-
1. **Company Name:** Payment in Motion Inc
- Attendee:** Dennis Fletcher
- Address:** 85 Concession Rd
- City, State Zip:** Sunerland, ON L0C1H0
- Phone Number:** (226) 387-4476 **Registered on CAMM NET?** ☒ Yes ☐ No
- Prime** ☒ **Sub** ☐ **DBE** ☐
- E-Mail Address:** dennis@paymentinmotion.com
-
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 REGISTRATION



OCTA RFP #: 4-2110

Date: April 30, 2024

Title: Replacement Fareboxes and Related Fare Collection Equipment

-
1. Company Name: Scheidt-Bachmann
Attendee: James Geleynse
Address: 1001 Pawtucket Blvd.
City, State Zip: Lowell, MA
Phone Number: (437) 326-6449 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐ DBE ☐
E-Mail Address: geleynse.james@scheidt-bachmann-usa.com
-
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 REGISTRATION**OCTA** RFP #: 4-2110

Date: April 30, 2024

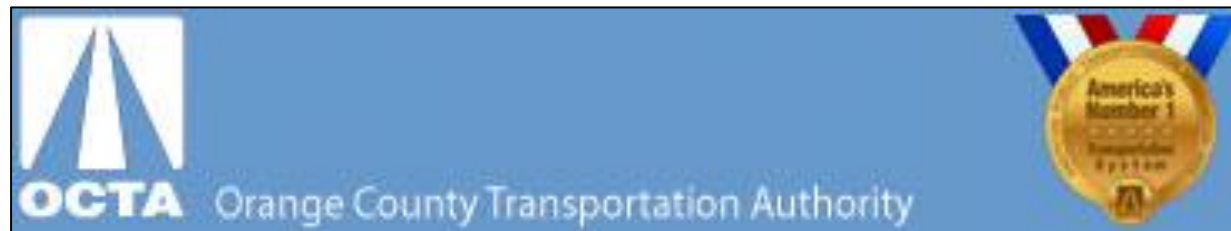
Title: Replacement Fareboxes and Related Fare Collection Equipment

1. **Company Name:** Scheidt & Bachmann Canada, Inc.
Attendee: James Geleynse
Address: 115 Saltsman Drive, Suite C-12
City, State Zip: Cambridge, ON N3H 4R7 Canada
Phone Number: (437) 326-8449 **Registered on CAMM NET?** ☒ Yes ☐ No
Prime ☒ **Sub** ☐ **DBE** ☐
E-Mail Address: geleynse.james@scheidt-bachmann-usa.com

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: _____

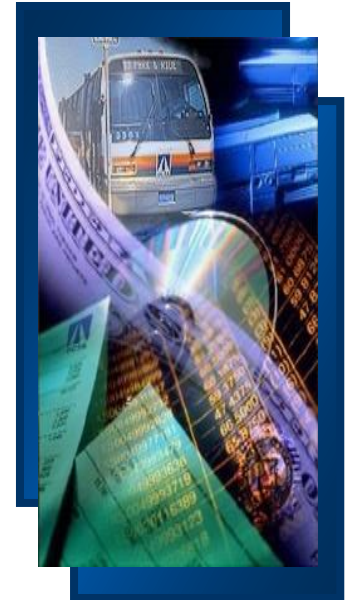
Pre-Proposal Conference for RFP 4-2110: Replacement of Fareboxes and Related Fare Collection Equipment



Agenda

ATTACHMENT B

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

Online Business & Networking Tools 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

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- 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

ATTACHMENT B

Written Questions Due:

May 3, 2024

OCTA Responds:

May 13, 2024

Proposals Due:

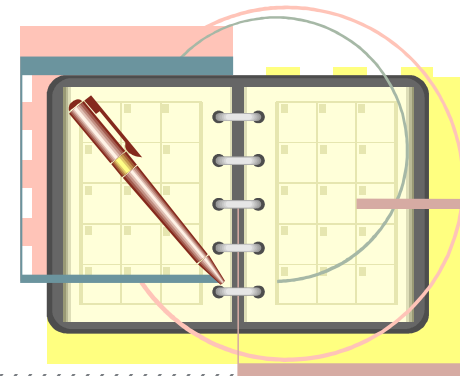
June 4, 2024, 2:00 PM

Interviews:

July 17, 2024

Board of Directors:

October 14, 2024



Key Procurement Information

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- All questions/contact with Authority staff should be directed to Iris Deneau, 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 is for a six-and-a-half year initial term with one, five-year option term

Guidelines for Written Questions

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- Questions must be submitted directly to Iris Deneau, Senior Contract Administrator, in writing, by: **May 3, 2024, 5:00 p.m.**
- E-mail recommended: idenEAU@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

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- Proposals are due by 2:00 p.m., June 4, 2024
- Proposals are to be submitted electronically as specified in the RFP
- The link has an upload file size limit of 80MB
- The Authority will not accept hard copy proposals for this RFP

Proposal Submittal Instructions (continued)

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- 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

- 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)

Forms:

- Exhibit D – Status of Past and Present Contracts Form
- Exhibit E – Campaign Contributions Form
- Exhibit F – Level 1 Safety Specifications (not submitted with proposal)
- Exhibit G – Proposal Exceptions and/or Deviations

Note: Forms excluded from 100-page proposal limit.

- Cost and Price Proposal – Exhibit B
 - Offeror shall submit proposed pricing to provide services described in Exhibit A, Scope of Work
 - Offerors shall complete the Excel file entitled **OCTA Farebox PriceSheets.xlsm**
 - Offerors shall only enter pricing as directed by the Price Summary Sheet instructions provided in the RFP
 - Offerors shall make no changes to the Price Summary Sheet form

Evaluation and Award

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

Qualifications of the firm	20%
Staffing and project organization	20%
Work plan	35%
Cost & price	25%

- Evaluation Committee comprised of internal OCTA staff

Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interview
- Interviews are scheduled for **July 17, 2024**
- Offerors are requested to keep this date available

- Award Process
 - Evaluation Committee recommends highest ranking Offeror to the Transit Committee
 - Transit 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

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- 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



Proposed Agreement

- Offerors are encouraged to review:
 - Article 3 - Scope of Work
 - Article 4 - Term of Agreement
 - Article 5 - Payment (Firm-Fixed)
 - Article 6 - Maximum Obligation
 - Article 9 - Insurance

Scope of Work

Isaac Herrera
Project Manager

Project Overview and Scope of Work

OCTA Farebox Replacement Project

Current Fare Collection System

Current fare collection system – GFI Genfare Farebox

- In service for roughly 24 years
- Accepts cash and magnetic stripe media

Challenges with the fareboxes:

- Fareboxes have reached 2x the end of their useful life
- Limited capability to expand pass programs
- Limited capability to support innovative fare products

Objectives for Future Fare Collection System

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1. Improve convenience and pricing equity for customers
2. Increase capability to provide innovative fare products
3. Enhance mobile ticketing fare options
4. Leverage use of existing validators
5. Increase capability to integrate with other modes of transportation and regional partners
6. Simplify farebox functionality

Replace with Modern Farebox - Highlights

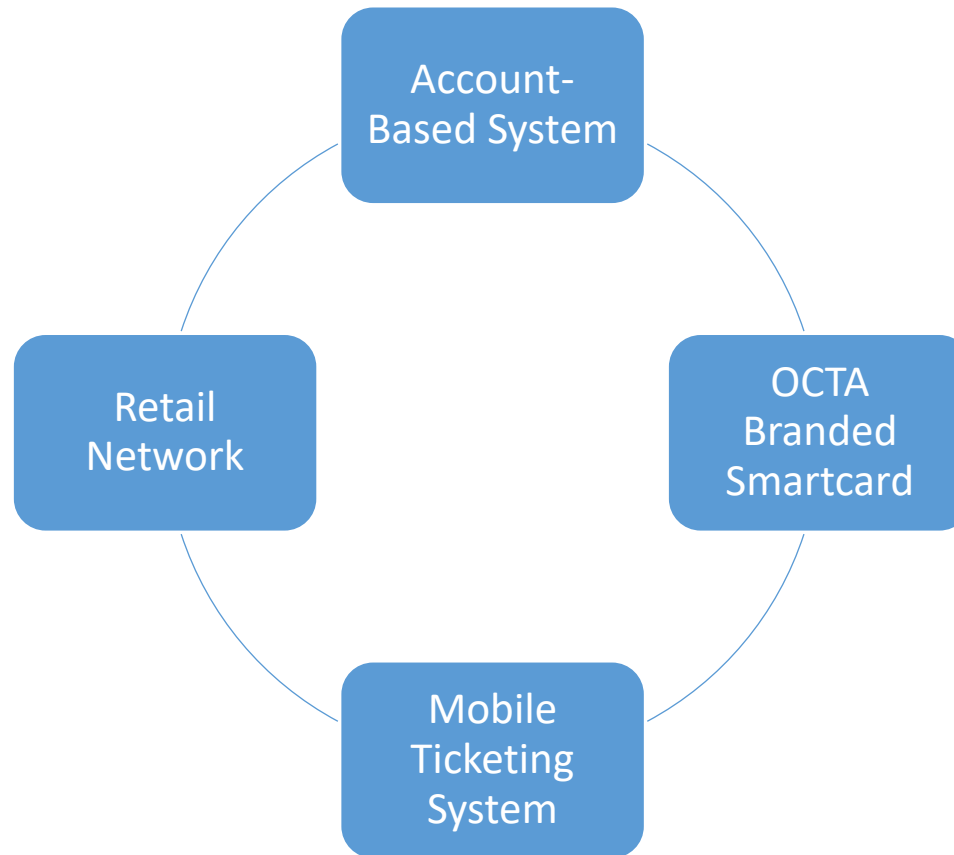
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- System will meet current business needs by providing familiar cash and other classifying types of boardings - DCU
- Decrease maintenance costs based on system design requiring no-specialty tool for maintenance
- Current system reliable for cash and coin collection – All infrastructure required for fare collection
- Hosted back-office system based on open architecture and real-time system monitoring
- Real-time transaction data and reporting
- Onboard Integration with CAD/AVL and validator – Single Sign-On

Rider Validation System (RVS)

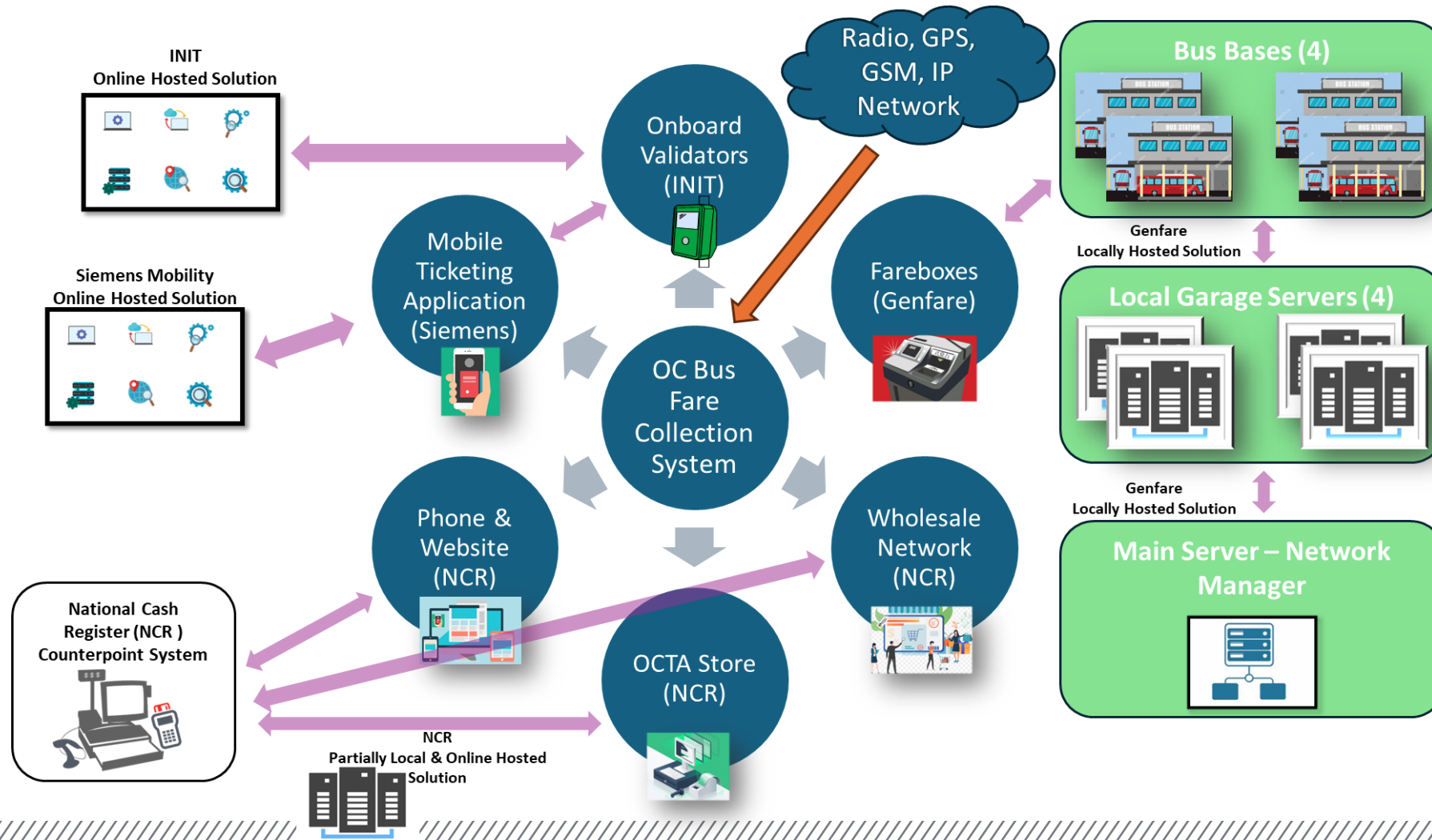
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Primary Elements of a Modern Fare Collection System:



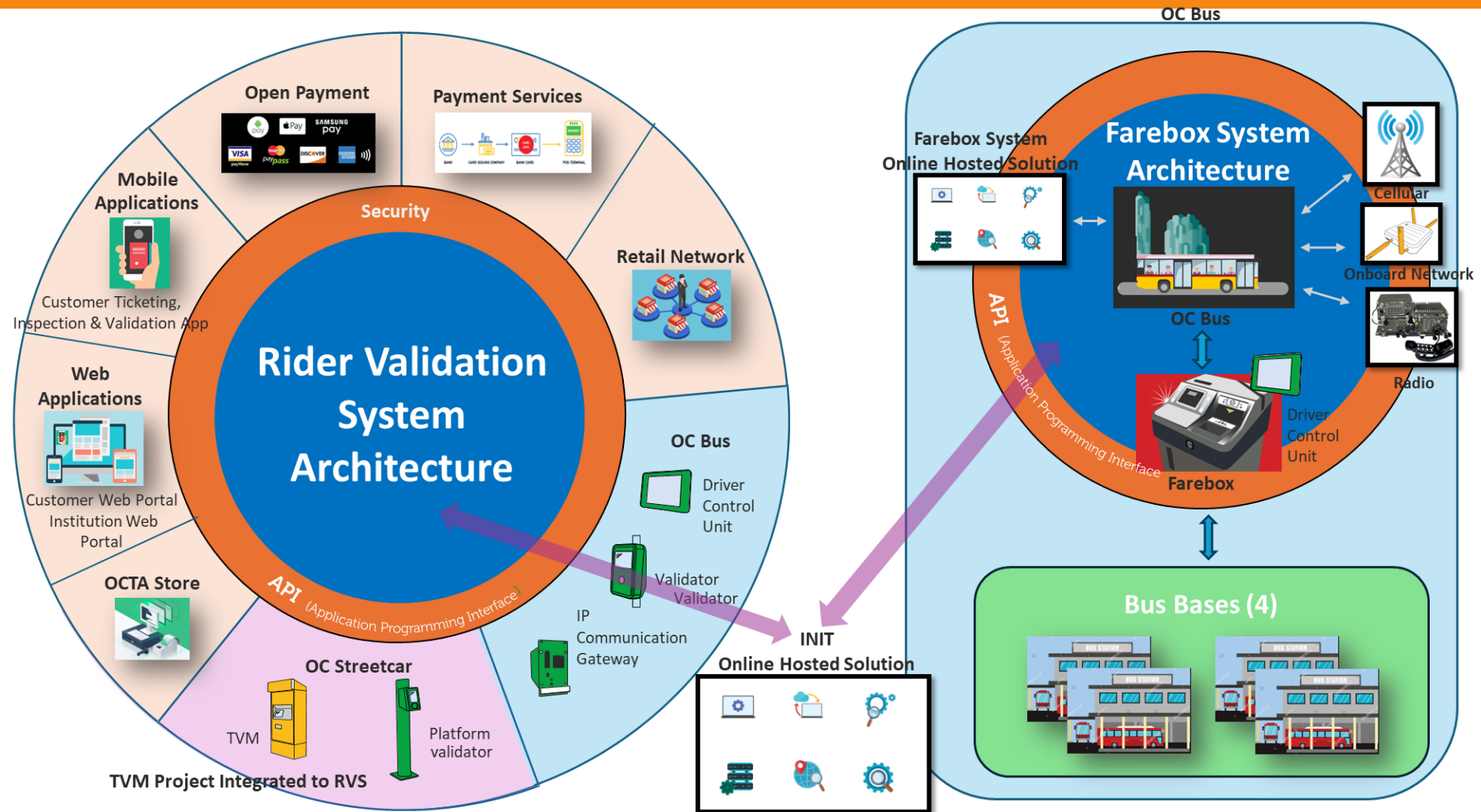
Current Fare Collection System

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RVS & Fareboxes

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- RVS Implementation to be completed by Summer of 2025
- Installation to align no later than one year post RVS implementation – Summer of 2026

- Questions?



- Reminder.... Proposals are due @ 2:00 pm on June 4, 2024
- Please complete registration sheet
- Please register on CAMM NET
- Thank you for your interest in OCTA!