



AFFILIATED AGENCIES

Orange County
Transit District

Local Transportation
Authority

Service Authority for
Freeway Emergencies

Consolidated Transportation
Service Agency

Congestion Management
Agency

April 26, 2024

**SUBJECT: Request for Proposals (RFP) 4-2155
“Professional Service On-Call Consultants for Measure M2 Program
Management Office”**

Ladies/Gentlemen:

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 April 30, 2024 at ~~9:00 am~~ **10:30 am**, attendance will be on-site/in-person at the Authority’s Administrative Office, 550 South Main Street, Orange, CA 92868 in Conference Room ~~07~~ **09**.

Participation via teleconference will also be available. **Prospective bidders may call-in using the following credentials:**

- Call-in number: +1 916-550-9867
 - Conference ID: ~~273-604-562#~~ **178 025 636#**
2. Offerors are advised that a copy of the pre-proposal conference presentation is presented as Attachment A to this Addendum No. 1.
 3. **Offerors who plan to attend the pre-proposal conference remotely are requested to submit via e-mail to gvalle@octa.net, no later than Wednesday, May 1, 2024 at 5pm, the Pre-Proposal Conference Registration Sheet which is presented as Attachment B to this Addendum No. 1.**
 4. Offerors are advised that answers to the offerors’ questions are presented as Attachment C 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 714-560-5670 or gvalle@octa.net.

Sincerely,

A handwritten signature in black ink, appearing to read 'Gustavo Valle', with a stylized, cursive script.

Gustavo Valle
Senior Contract Administrator
Contracts Administration and Materials Management

Attachments:

- Attachment A: Pre-Proposal Conference Presentation
- Attachment B: Pre-Proposal Conference Registration Sheet
- Attachment C: Questions Received and Authority's Responses

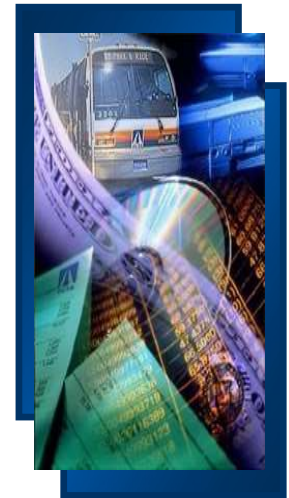
Pre-Proposal Conference for RFP 4-2155

Professional Service On-Call Consultants for Measure M2 Program Management Office



Agenda

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



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/>

Key Procurement Dates

Written Questions Due:

May 2, 2024

OCTA Responds:

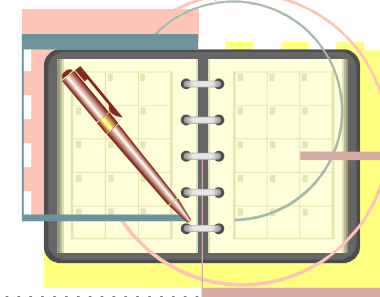
May 9, 2024

Proposals Due:

May 17, 2024, 2:00 PM

Interviews:

June 19, 2024



Key Procurement Information

- All questions/contact with Authority staff should be directed to the assigned Contract Administrator, Gustavo Valle
- 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 three years
- Funded with Measure M2 funds

Guidelines for Written Questions

- Questions must be submitted directly to Gustavo Valle, Contract Administrator, in writing, by: **May 2, 2024, 5:00 p.m.**
- E-mail recommended: gvalle@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., **May 17, 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)

- 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) Exceptions / Deviations (Technical vs. Contractual)

Proposal Content (continued)

Forms:

- Exhibit C – Status of Past and Present Contracts
- Exhibit C – Proposal Exceptions and/or Deviations
- Exhibit H – Safety Specifications (not submitted with proposal)

Note: Forms excluded from 50-page proposal limit.

Evaluation and Award

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

Qualifications of the Firm	30%
Staffing and Project Organization	30%
Work Plan	20%
Cost and Price	20%

- 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 **June 19, 2024**
- Offerors are requested to keep this date available

Award

- Award Process
 - Evaluation Committee will make recommendation to Authority's management
 - 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 F – Proposal Exceptions and/or Deviations Form and submitted with the proposal



Proposed Agreement

- Offerors are encouraged to review:
 - Article 3 – Scope of Work
 - Article 5 – Contract Task Orders (CTO) and Payment
 - Article 9 – Insurance
 - Article 28 – Health and Safety Requirements

Scope of Work

Francesca Ching
Section Manager III

Project Overview and Scope of Work

Background

- Overview of Measure M2 (M2)
 - 30-year half-cent sales tax for transportation improvements
- Governed by Ordinance No. 3 (M2 Ordinance)
 - Includes Transportation Investment Plan (Plan), which outlines projects and programs to be delivered
- Role of OCTA
 - M2 Ordinance designates OCTA to administer the Plan
- Purpose of PMO
 - Oversight of M2 implementation
 - Ensure compliance with M2 Ordinance



Project Information

Soliciting on-call bench to support PMO with the following task areas:

- **Policy and Regulatory**
 - Analytical support services to evaluate and make recommendations to ensure compliance with M2 Ordinance, state, and federal requirements
- **Risk Management**
 - Review M2 program risks to ensure OCTA is able to deliver on voter promises
 - Assist, evaluate, and analyze M2 programs and projects
- **Database Development**
 - Manage and refine existing data, rectify issues within existing databases, and potentially create a new database tailored to our specific needs
- **Miscellaneous Services**
 - May include but is not limited assistance creating reports, report templates, photography of M2 projects, creating/producing sign templates, digital media, and reprographics such as brochures, etc.

- Questions?



- Reminder.... Proposals are due @ 2:00 pm on May 17, 2024
- Please submit a completed registration sheet
- Please register on CAMM NET



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP 4-2155

Addendum No. 1

Attachment B

RFP No. 4-2155

Date: April 30, 2024

Title: On-Call Professional Consultant Services for Measure M2 Program Management Office

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

E-Mail Address: _____

3. Company Name: _____
Attendee: _____
Address: _____
City, State Zip: _____
Phone Number: () _____ Registered on CAMM NET? ☐ Yes ☐ No

E-Mail Address: _____

4. Company Name: _____
Attendee: _____
Address: _____
City, State Zip: _____
Phone Number: () _____ Registered on CAMM NET? ☐ Yes ☐ No

E-Mail Address: _____

Questions Received (Q) and Authority Answers (A)

- Q1.** Is this a new initiative? If not, please provide the names of the current vendor(s) providing the services.
- A1.** No, this is not a new initiative.
Current consultants on contract are Cumming Management Group and JOA Group.
- Q2.** Can you please let us know the previous spending of this contract?
- A2.** There were no task orders issued from the previous contract.
- Q3.** Please confirm if we can get the proposals or pricing of the incumbent(s). Are there any pain points or issues with the current vendor(s)?
- A3.** In order to obtain copies of the proposals of the incumbents for this contract, please submit a Public Records Request through this website [Public Records Request](https://octa.govqa.us/WEBAPP/rs/(S(o1wtukkbrueeqmjtxpwmvbm))/support/home.aspx) or [https://octa.govqa.us/WEBAPP/rs/\(S\(o1wtukkbrueeqmjtxpwmvbm\)\)/support/home.aspx](https://octa.govqa.us/WEBAPP/rs/(S(o1wtukkbrueeqmjtxpwmvbm))/support/home.aspx)
There are no pain points or issues with the current vendors.
- Q4.** Please confirm the anticipated number of awards.
- A4.** It is anticipated that 4-5 contracts will be awarded. It is at the OCTA's discretion how many contracts will result from the solicitation.