



AFFILIATED AGENCIES

*Orange County
Transit District*

*Local Transportation
Authority*

*Service Authority for
Freeway Emergencies*

*Consolidated Transportation
Service Agency*

*Congestion Management
Agency*

May 9, 2024

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

Ladies/Gentlemen:

This letter and its attachments comprise **Addendum No. 3** to the above captioned Request for Proposals issued by the Orange County Transportation Authority (“Authority”).

1. Offerors are advised that the Authority has received questions regarding the subject RFP. The questions received and Authority’s responses to Offerors’ questions are presented as Attachment A to this **Addendum No. 3**.

Offerors are reminded to acknowledge receipt of this **Addendum No. 3** in their Letter of Transmittal, which is to accompany the proposal. Offerors are advised that all changes addressed in this **Addendum No. 3** shall be incorporated into the final Agreement.

Questions regarding this Addendum No. 3 should be directed to the undersigned at 714-560-5670 or gvalle@octa.net.

Sincerely,

Gustavo Valle
Senior Contract Administrator
Contracts Administration and Materials Management

Attachments:

Attachment A: Questions Received and Authority’s Responses

Questions Received (Q) and Authority Answers (A)

- Q5.** Is the Authority looking for Consulting Services or Staffing Services?
- A5. The Authority is seeking Consulting Services.
- Q6.** Is the Authority looking for firms to provide in-house personnel to perform the services requested under this solicitation or for firms to recruit personnel to provide the requested services under this RFP?
- A6. The Authority is seeking to hire in-house personnel (preferred) but Offerors may retain subconsultants to perform portions of the work.
- Q7.** How many firms is the Authority looking to award?
- A7. Please see response A4 issued with Addendum No. 1.
- Q8.** Is there any subcontracting goal?
- A8. No, there is no subcontracting goal.
- Q9.** Are electronic signatures allowed?
- A9. Yes, electronic signatures are allowed.
- Q10.** Can firms provide commercial references?
- A10. Yes, commercial references can be provided.
- Q11.** Could the Authority please clarify if firms can bid only on one task area enlisted in the Scope of Work?
- A11. Consultant is required to propose on all task areas. Offerors may retain subconsultants to perform portions of the work.
- Q12.** Can firms provide references from ongoing projects/contracts?
- A12. Yes, firms can provide references from ongoing projects/contracts.
- Q13.** Could the Authority please clarify if, by key personnel, they mean the personnel who will manage the execution of this contract or the personnel who will perform the services requested under this solicitation?
- A13. Key personnel are generally the personnel whom the CONSULTANT proposes to perform essential portions of the work.

- Q14.** In Section II. PROPOSAL CONTENT, under point A.2 “Letter of Transmittal,” in item b, the following is requested: “Identification of all proposed subcontractors including legal name of company, whether the firm is a Disadvantaged Business Enterprise (DBE)”. Could the Authority please clarify if there’s any mandatory subcontracting goal for DBE?
- A14. For this RFP, a DBE goal is not mandatory. The work is not funded with federal funds. Offerors are requested, however, to identify DBE subcontractors.
- Q15.** In Section II. PROPOSAL CONTENT, under point A.2 “Letter of Transmittal,” in item b, the following is requested: “Identification of all proposed subcontractors including legal name of company, whether the firm is a Disadvantaged Business Enterprise (DBE)”. Could the Authority please clarify if they will favor DBE?
- A15. Please see response to Q14 above. Further, per RFP section titled “Notice of Request for Proposals” Offerors are encouraged to subcontract with small businesses to the maximum extent possible.
- Q16.** In Section II. PROPOSAL CONTENT, under subsection A.3 “Technical Proposal,” under point, a. “Qualifications, Related Experience and References of Offeror,” states: “This section of the proposal should establish the ability of Offeror to satisfactorily perform the required work by reasons of: experience in performing work of a similar nature; demonstrated competence in the services to be provided; strength and stability of the firm; staffing capability; workload; record of meeting schedules on similar projects; and supportive client references.” Could the Authority please clarify if firms can provide their experience information in the private sector to suffice this requirement?
- A16. Offerors may provide any experience related to the requirements of the scope of work. The evaluation committee will review the experience provided.
- Q17.** In Section II. PROPOSAL CONTENT, under point A.2 “Letter of Transmittal,” in item b, the following is requested: “Identification of all proposed subcontractors including legal name of company, whether the firm is a Disadvantaged Business Enterprise (DBE)”. Could the Authority please clarify if there’s any mandatory subcontracting goal for DBE?
- A17. Please see response to Q14 above.

Q18. In Section II. PROPOSAL CONTENT, under subsection A.3 “Technical Proposal,” under point, a. “Qualifications, Related Experience and References of Offeror,” states: “This section of the proposal should establish the ability of Offeror to satisfactorily perform the required work by reasons of experience in performing work of a similar nature; demonstrated competence in the services to be provided; strength and stability of the firm; staffing capability; work load; record of meeting schedules on similar projects; and supportive client references.” Could the Authority please clarify what do they mean by “strength and stability of the firm” under this instruction?

A18. In evaluating an offeror’s proposal, factors related to the office proposing to perform the work, support from other offices, and their staff are considered.

Q19. In Section II. PROPOSAL CONTENT, under subsection A.3 “Technical Proposal,” under point a. “Qualifications, Related Experience and References of Offeror,” states: “This section of the proposal should establish the ability of Offeror to satisfactorily perform the required work by reasons of: experience in performing work of a similar nature; demonstrated competence in the services to be provided; strength and stability of the firm; staffing capability; work load; record of meeting schedules on similar projects; and supportive client references.” Could the Authority please clarify if by “staffing capability” they mean the number of available resources to perform the services requested under this instruction? If not, could the Authority please elaborate further on what information vendors must provide to suffice this requirement?

A19. Offeror’s understanding is correct.

Q20. In Section II. PROPOSAL CONTENT, under subsection A.3 “Technical Proposal,” under point, a. “Qualifications, Related Experience and References of Offeror,” states: “This section of the proposal should establish the ability of Offeror to satisfactorily perform the required work by reasons of: experience in performing work of a similar nature; demonstrated competence in the services to be provided; strength and stability of the firm; staffing capability; work load; record of meeting schedules on similar projects; and supportive client references.” Could the Authority please clarify what do they mean by “workload” under this instruction? Could the Authority please elaborate further on what information vendors must provide to suffice this point?

A20. Ability of Offeror to manage/balance workloads.

Q21. In Section II. PROPOSAL CONTENT, under subsection A.3 “Technical Proposal,” under point a. “Qualifications, Related Experience and References of Offeror,” in item (1), the following is requested: “Provide a brief profile of the firm, including the types of services offered; the year founded; form of the organization (corporation, partnership, sole proprietorship); number, size, and location of offices; and number of employees.” Could the Authority please clarify what they mean by “number” and “size” under this instruction? Could the Authority please clarify how the following points requested under this instruction are different between each other: “number”, “size” and “number of employees”?

A21. This refers to the Offering firm’s number of offices, size and locations.

Q22. In Section II. PROPOSAL CONTENT, under subsection A.3 “Technical Proposal,” under point a. “Qualifications, Related Experience and References of Offeror,” in item (4), the following is requested: “Identify subcontractors by company name, address, contact person, telephone number, email, and project function. Describe Offeror’s experience working with each subcontractor.” Could the Authority please clarify if it is mandatory for firms to have prior work experience with the identified(s) subcontractor(s)?

A22. It is not mandatory for Offeror to have prior work experience with the proposed subcontractors.

Q23. In Section II. PROPOSAL CONTENT, under subsection A.3 “Technical Proposal,” under point b. “Proposed Staffing and Project Organization” states: “This section of the proposal should establish the method, which will be used by the Offeror to manage the project, as well as identify key personnel assigned.” Could the Authority please clarify if, by “method,” they mean the firm’s project management approach? If not, could the Authority please elaborate further on what information vendors must provide to suffice this requirement?

A23. The Authority cannot provide specific information in this area.

Q24. In Section II. PROPOSAL CONTENT, under subsection A.3 “Technical Proposal,” under point b. “Proposed Staffing and Project Organization,” in point (2), the following is requested: “Furnish brief resumes (not more than two [2] pages each) for the proposed Project Manager and other key personnel that includes education, experience, and applicable professional credentials.” Could the Authority please clarify what “credentials” means under this instruction? Could the Authority please clarify if firms must provide any certifications for the key personnel along with their resumes?

A24. The Offeror is to provide any information that shows how the proposed staff are qualified to perform the required work including any relevant professional credentials such as degrees, licenses and certifications.

Q25. If a vendor does not have any exceptions and/or deviations, could this form be filled out with N/A?

A25. The Offeror may place N/A if exceptions/deviations are not being requested.

Q26. Could the Authority please confirm if the vendor must submit one document to the portal?

A26. Offeror can submit multiple files as long as the total size is under 80 MB.

Q27. How many firms is the Authority looking to award?

A27. Please see response A4 issued with Addendum No. 1.

Q28. Are electronic signatures allowed?

A28. Electronic signatures are allowed.

Q29. Is there any SBE/MBE/WBE goal for this solicitation? If yes, what is the established goal?

A29. Please see the Authority's response to Q14 and Q15 above. Further, no other subcontracting goals are required by this RFP.

Q30. Does the Authority accept remote resources to work on this engagement?

A30. The Offeror may utilize remote resources on this work.

Q31. Does the Authority accept offshore resources to work on this engagement?

A31. Offeror may not utilize offshore resources on this work.

Q32. Does the Authority prefer on-site resources to execute this engagement?

A32. The Authority has no preference for utilizing on-site resources.

Q33. Could the Authority please confirm the anticipated number of requirements per year?

A33. The number of requirements/assignments is to be determined and will depend on the needs of the Authority.

Q34. In case firms are submitting confidential information in the response, is it required to provide a redacted version?

A34. Per the RFP's Section II, paragraph M, all proposals submitted in response to this RFP are subject to the Public Records Act. Offeror shall make a decision as to whether confidential information may need to be redacted prior to submittal to Authority.

Q35. Could the Authority kindly clarify the exact number of attached files needed for the response?

A35. The number of attached files is at the discretion of the Offeror.

Q36. If firms must present actual candidates, can these be replaced by equally qualified candidates if they are no longer available at the time of contract award?

A36. It is the Authority's expectation of Offerors, that the staff proposed is the same staff that performs the work after contract award. The offeror's proposal is evaluated, in part, on the staff proposed at the time of proposal submittal.

Q37. Are the resumes requested sample resumes or actual resumes?

A37. Actual resumes are expected to be submitted for the proposed staff.

Q38. Will task orders be released under this contract?

A38. Yes. Task Orders will be issued as part of this contract depending on the needs of the Authority.

Q39. Could the Authority please clarify whether firms must present a separate work plan for every task area enlisted under the Scope of Services or only one work plan for all the task areas enlisted under the Scope of Services?

A39. Authority expects an Offeror to respond to the entire scope of work.

Q40. If firms can select a task area to bid on this solicitation, could the Authority please clarify if firms can provide a work plan for only the task area they are bidding on?

A40. Please see response to Q39 above.

- Q41.** Regarding the pricing, could the Authority please clarify whether firms can add key personnel information at their discretion based on the Scope of Services?
- A41. Offerors are expected to propose key personnel and other labor charges (non-key) who are best qualified to perform the services required in the scope of work. Offerors are required to submit specific named personnel and their fully burdened hourly billing rates at the time of proposal.
- Q42.** Regarding the pricing, could the Authority please clarify if firms are required to provide “other labor charges” or if it is optional?
- A42. Other labor charges refer to non-key personnel. The Offeror is not required to propose them if not needed.
- Q43.** Is this a new initiative? If not, could the Authority please provide the incumbent information?
- A43. The M2 program is not a new initiative. Please see responses to Q1 and Q3 issued via Addendum No. 1.
- Q44.** Programs with large budgets are often required to have 3rd parties perform oversight. Does the Authority prefer the firms delivering work under this bench contract be independent of firms supporting the execution of the OC Go / M2 projects and programs?
- A44. The Authority has no preference in this regard.
- Q45.** Can you clarify the applicability of RFP section I, paragraph K – Conflict of Interest to the bench contract and future task orders? Conflicts of interest may arise when firms perform risk management on their own work. Will the firms working on OC Go / M2 projects and programs be precluded from performing the Risk Management task area described in this RFP?
- A45. The firms working on OC Go / M2 projects and programs will not be precluded from performing work under this contract.

RFP 4-2155
ADDENDUM NO. 3
ATTACHMENT A

- Q46.** RFP section III, part A states Cost and Price will be evaluated based on the total price as well as the individual tasks. RFP section II, part A.4 states offeror shall complete Exhibit B – Price Summary Sheet. Exhibit B allows for any labor classifications and job functions and does not include an area to provide the amount of time or total price. How will Cost and Price be evaluated appropriately in terms of firms proposing to do more work and provide more value in less time and ultimately lower cost?
- A46. The evaluation of the proposal will take into consideration the price (20%) and all other factors described in Section III of the RFP.
- Q47.** Does the Authority envision allowing fixed price bids in response to task order solicitations to transfer more of the financial, administrative tracking and budget risks to the selected consultant?
- A47. The work under this contract is not firm fixed price, it is reimbursed on a time and expense basis.
- Q48.** Please clarify, will each master contract awarded in response to this RFP include an expenditure authorization or 'not to exceed' amount of the \$400,000 project budget over the 3-year term?
- A48. A bench will be established, and each firm on the bench will have a contract with a 'not to exceed' amount of \$400,000 over a 3-year term, depending on the needs of the Authority.