



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*

June 13, 2024

**SUBJECT: Requests for Proposals (RFP) 4-2217
“On-Call Real Property Appraisal and Related Services”**

Gentlemen/Ladies:

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 June 18, 2024, at 1:00 pm. **Offerors may join in person, join via Teams, or call-in, using the following credentials:**
 - [Click here to join the meeting](#)
 - Or Call-in Number: 1-916-550-9867
Conference ID: 162 275 090#
 - In-person: OCTA Headquarters
550 S. Main St.
Orange, CA 92863
Conference Room 09
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 virtually are requested to submit via e-mail to mbornman@octa.net, no later than Tuesday, June 18, 2024 at 5:00 pm, the Pre-Proposal Conference Registration Sheet which is presented as Attachment B 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.

June 13, 2024

Page 2

Questions regarding this **Addendum No. 1** should be directed to the undersigned at 714-560-5064 or mbornman@octa.net.

Sincerely,



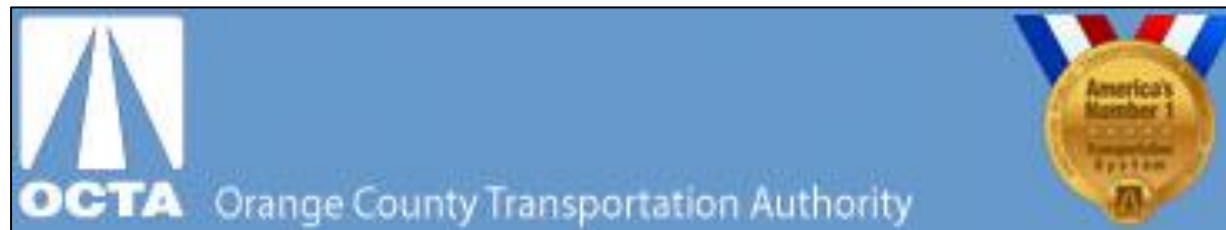
Megan Bornman
Senior Contract Administrator
Contracts Administration and Materials Management

Attachments:

Attachment A: Pre-Proposal Conference Presentation

Attachment B: Pre-Proposal Conference Registration Sheet

Pre-Proposal Conference for RFP 4-2217: “On-Call Real Property Appraisal and Related Services”



Agenda

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- 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

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- 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

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

Written Questions Due:

June 20, 2024

OCTA Responds:

June 27, 2024

Proposals Due:

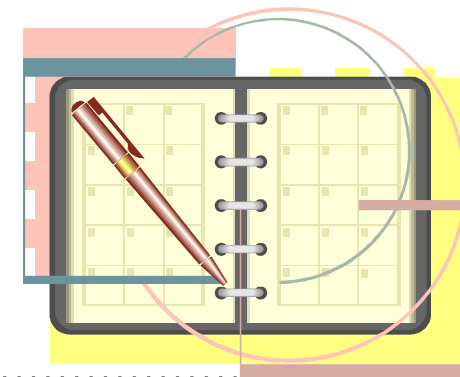
July 10, 2024, 2:00 PM

Interviews:

August 14, 2024

Board of Directors Approval:

October 14, 2024



Key Procurement Information

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- All questions/contact with Authority staff should be directed to the assigned Contract Administrator, Megan Bornman
- Next Addendum will contain a copy of the Pre-Proposal sign-in sheet
- Funded with M2/Local funds
- Award based on prime-sub relationship, not joint ventures
- Contract term is for 5 years
- Contract task orders will be issued on a rotational basis

Guidelines for Written Questions

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- Questions must be submitted directly to Megan Bornman, Contract Administrator, in writing, by: **June 20, 2024, 5:00 p.m.**
- E-mail recommended: mbornman@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

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- Proposals are due by 2:00 p.m., July 10, 2024
- Proposals are to be submitted to the address specified in the RFP
- Proposers shall submit, electronically, the full Proposal Package
- Hard copies of proposals will not be accepted by the Authority for this RFP

Proposal Submittal Instructions (continued)

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- 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

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- 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

Forms:

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

Note: Forms excluded from 50-page proposal limit.

Proposal Content (continued)

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- Price Summary Sheet– 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

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

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

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

- Evaluation Committee comprised of OCTA staff

Evaluation and Award (continued)

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- “Short-Listed” firms will be invited to interview
- Interviews are scheduled for **August 14, 2024**
- Offerors are requested to keep this date available

- Award Process

- Evaluation Committee recommends highest ranking Offeror to the Regional Transportation Planning (RTP) Committee
- RTP 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

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- 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

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT A

- Offerors are encouraged to review:
 - Article 3 - Scope of Work
 - Article 4 - Term of Agreement
 - Article 5 - Contract Task Orders (CTO) and Payment
 - Article 6- Maximum Obligation
 - Article 9 – Insurance
 - Article 17 – Conflict of Interest
 - Article 18 – Code of Conduct
 - Article 19 - Prohibitions

Scope of Work

Joe Gallardo

Department Manager, Real Property

Project Overview and Scope of Work

The Orange County Transportation Authority (Authority) requires consultant services to provide appraisal services for the acquisition and disposition of property rights necessary for public transportation projects involving roadways, highways, freeways, transit, and railroad corridors.

This work will be performed in conjunction with various transportation improvement projects, and will include appraisal services for Authority-owned facilities and buildings and may include light rail and railroad right of way corridors.

Consultant shall produce appraisal and appraisal summary reports including but not limited to:

- Fee/full parcel acquisition
- Partial fee acquisition
- Permanent Easements
- Temporary Construction Easements
- Special need property right (i.e. Wells)
- Surplus or excess real property
- Vacant or improved commercial/retail, industrial, single family and multi-tenant residential properties
- Agricultural
- Open space
- Land conservation parcels for environmental mitigation purposes
- Railroad

• Consultant may provide specialty appraisal services such as:

- Loss of Business Goodwill (principal area of work)
- Furniture, Fixtures, Machinery & Equipment (principal area of work)
- Expert Witness
- Appraisal Review Services

- Questions?



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

- Reminder.... Proposals are due @ 2:00 pm on July 10, 2024
- Please sign in on registration sheet and leave a business card if in person
- Please submit registration sheet via email if online
- Please register on CAMM NET
- Thank you for your interest in OCTA! Feel free to stay and network.



RFP 4-2217

PRE-PROPOSAL REGISTRATION

RFP 4-2217
ADDENDUM NO. 1
ATTACHMENT B

Date: June 18, 2024

Title: On-Call Real Property Appraisal and Related Services

-
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: _____