



June 27, 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 Proposals (RFP) 4-2217, "On-Call Real Property Appraisals and Related Services"

Gentlemen/Ladies:

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 by the date and time specified in the RFP. Those questions and Authority's written responses are presented as Attachment A to this Addendum No. 3.
2. Offerors are advised that a pre-proposal registration sheet was inadvertently omitted from the previous addendum and is presented as Attachment B to this Addendum No. 3.
3. Offerors are advised that Section II, 'Proposal Content', paragraph A.3.b section (3), "Indicate adequacy of labor resources utilizing a table projecting the labor-hour allocation to the project by individual task" is not required for this RFP.

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 714-560-5064.

Sincerely,

Megan Bornman
Senior Contract Administrator
Contracts Administration and Materials Management

Attachments:

- Attachment A: Question Received & Authority's Responses
- Attachment B: Pre-Proposal Registration Sheets

Questions Received (Q) and Authority Answers (A)

- Q1. How many days may Consultants expect minimum for notice of invitation to interview ahead of the August 14 interview date?**
- A1. The Authority's intent is to give seven (7) calendar days' notice prior to the interview. The interview date of August 14, 2024 is noted in the RFP.
- Q2. May the Consultant enlist a subconsultant to provide appraisal review services for comprehensive task order coverage (ie a Prime Consultant conducts the appraisal and then their Subconsultant can provide appraisal review on the same task order)? Or will OCTA prefer to do appraisal reviews with other consultants on the bench should a Prime Consultant not have present availability on a certain task order to perform standalone appraisal review?**
- A2. The Consultant team who performs appraisal services are precluded from performing appraisal review services for the same project, due to conflict of interest. The Authority will issue appraisal and appraisal reviews under separate contract task orders (CTO).
- Q3. Since this is an on-call, may you please clarify if a "table projecting the labor-hour allocation to the project by individual task" is still expected for this proposal per Section II, subsection b - Proposed Staffing and Project Organization?**
- A3. Offerors are advised that Section II, 'Proposal Content', paragraph A.3.b section (3), "Indicate adequacy of labor resources utilizing a table projecting the labor-hour allocation to the project by individual task" is not required for this RFP.
- Q4. Which appraisal firms are on the current bench? If OCTA is not able to provide the firm names, how many firms are on the current bench?**
- A4. There are four firms on the current bench: Hendrickson Appraisal Company, Inc., Hennessey & Hennessey, LLC, CBRE, Inc., and R.P. Laurain & Associates, Inc.
- Q5. Would a Consultant be considered to have a conflict of interest if they hold other on-call contracts with OCTA, such as for ROW Services or serve as a subconsultant for ROW services on specific OCTA projects?**
- A5. The Authority does not anticipate a conflict of interest with OCTA's current on-call right of way (ROW) work. If there are specific questions related to potential conflicts of interest, please submit an inquiry to the Contract Administrator for evaluation and determination.

Q6. Is time spent by the consultant in the office and at project site meetings to be included in the original quoted fee or handled separately on a time & expense basis?

A6. CTOs will be issued on a time and expense basis. Consultants will be requested to provide a work plan and price summary sheet which shall include all personnel hours and/or expenses for completing the SOW under that specific CTO. The Consultant shall utilize the hourly labor rates for the prime and its subconsultants from the Exhibit B, 'Price Summary Sheet' submitted with its proposal which will be made a part of the Agreement.

Q7. Should a Consultant's exception/deviation receive "fail" status, would that reflect negatively on the proposal evaluation (lower automatic scoring, etc)?

A7. The outcome of the exception and/or deviation review does not have an impact on the proposal's score. Per Section II. 'Proposal Content', paragraph d. 'Exceptions/Deviations', "offerors that receive a "fail" status on their exceptions and/or deviations will be notified by the Authority and will be allowed to retract the exception and/or deviation and continue in the evaluation process. Any exceptions and/or deviations that receive a "fail" status and the Offeror cannot or does not retract the requested change may result in the firm being eliminated from further evaluation."

Q8. For Exhibit B - Price Summary Sheet form, appraisals are typically billed as lump sum/fixed fee other direct costs. May we include price ranges for varying appraisal types as Other Direct Costs and as an appended page to Exhibit B?

A8. CTOs will be issued on a time and expense basis. Consultants shall submit hourly labor rates for all personnel proposed to provide services under the resulting Agreement on Exhibit B, 'Price Summary Sheet', to be included with its proposal. Consultants may propose non-labor costs on Schedule II, 'other direct costs schedule'.

Q9. Would OCTA prefer for only appraisers to be designated as key staff in the proposal, since the Price Summary Sheet form denotes researchers, admin support, etc. as "Other Labor Charges"?

A9. The 'appraiser' classification is included in the 'other labor charges' section on the Price Summary Sheet form. It is the discretion of each proposing firm to identify key staff based on its proposed project organization.

Q10. We understand there is a 50-single page limit excluding any appendices, cover letters, two-page resumes, or forms. Could you please confirm if copies of our key personnel and subconsultant's appraiser licenses and

designations, including tab pages will count toward the 50-page limit? Currently, we have 26 pages consisting of our key personnel and subconsultant's appraiser licenses and designations only.

A10. Appraiser licenses, designations and tab pages do not count toward the 50-page limit.

Q11. If a Consultant has no past or present contracts that have involved litigation with the contracting authority, how should the Consultant complete Exhibit D – Status of Past and Present Contracts Form? Perhaps just putting “Not Applicable” across the top of the form and then signing?

A11. Please note ‘not applicable’ and sign and date the form.

Q12. Will a Consultant who submits Exceptions/Deviations on the form provided in the RFP be scored lower than other Consultants who do not?

A12. Please see response to Q7, above.



RFP 4-2217

PRE-PROPOSAL REGISTRATION

RFP 4-2217
ADDENDUM NO. 3
ATTACHMENT B

Date: June 18, 2024

Title: On-Call Real Property Appraisal and Related Services

1. Company Name: Bender Rosenthal Inc
Attendee: Natalie Miranda
Address: 2825 Watt Avenue, Suite 200
City, State Zip: Sacramento, CA 95821
Phone Number: (916) 978-4900 x 2087 Registered on CAMM NET? ☒ Yes ☐ No
E-Mail Address: n.miranda@benderrosenthal.com

2. Company Name: Bender Rosenthal Inc.
Attendee: Dave Wraa, MAI, ARA, AI-GRS
Address: 2825 Watt Avenue, Suite 200
City, State Zip: Sacramento, CA 95821
Phone Number: (916) 978-4900 x 4001 Registered on CAMM NET? ☒ Yes ☐ No
E-Mail Address: d.wraa@benderrosenthal.com

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: _____