



July 23, 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) 4-2285
“Federal Legislative Advocacy and Consulting Services”**

Gentlemen/Ladies:

This letter shall serve as Addendum No. 1 to the above RFP issued by the Orange County Transportation Authority (Authority).

Offerors are advised that the proposal submittal date has been changed to at or before 2:00 p.m., August 12, 2024.

A pre-proposal conference was held on July 16, 2024, at 10:00 a.m. EST in Washington DC.

The following documents are attached to this Addendum No. 1

- Registration Sheet – Attachment A
- Pre-Proposal Conference Presentation – Attachment B

Offerors are reminded to acknowledge receipt of this Addendum No. 1 in their transmittal letter and Exhibit B, “Price Summary Sheet.” 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 gmartinez@octa.net.

Sincerely,

Georgia Martinez
Department Manager, Contracts and Procurement

PRE-BID / PRE-PROPOSAL REGISTRATION

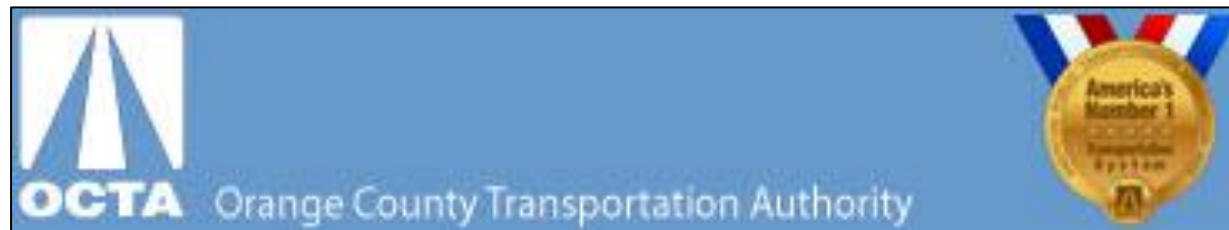
**RFP #: 4-2285**

Date: July 16, 2018²⁴

Title: Federal Legislative Advocacy and Consulting Services

- [illegible]

Pre-Proposal Conference for RFP 4-2285: Federal Legislative Advocacy and Consulting Services



Agenda

- Introductions
- Online Business and Networking Tools
- Key Procurement Information & Dates
- Review of RFP Documents
- Review of the 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

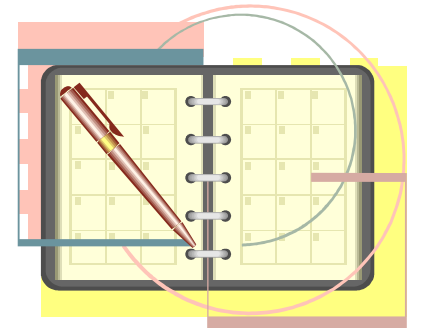
- CAMM NET Connect
 - <https://www.facebook.com/CammnetConnect>
- Working with OCTA
 - <https://cammnet.octa.net/about-us/working/>
- Planholder's List
 - <https://cammnet.octa.net/procurements/planholders-list-selection/>

Vendor Video Training

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

Key Procurement Dates

- Written Questions Due: July 24, 2024
- OCTA Responds: July 29, 2024
- Proposals Due: ***August 12, 2024, 2:00 p.m.**
- Interviews: September 17, 2024
(Washington D.C.)
- Board of Directors: November 25, 2024



Key Procurement Information

- 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 two-year initial term with two, two-year option terms

Guidelines for Written Questions

- Questions must be submitted directly to Georgia Martinez, Department Manager Contracts and Procurement, in writing, prior to established due dates.
- E-mail: gmartinez@octa.net
- Any changes Authority makes to procurement documents will be by written Addenda only.
- Addenda will be issued via CAMM NET.
- Verbal discussions today are non-binding.

Next...
Proposal Instructions

Then...
Review of Scope of Work

Proposal Submittal Instructions

(Refer to RFP Section I, pp. 4 & 5)

- Proposals are due by 2:00 p.m. on **August 12, 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 reserves the right to:
 - accept or reject any and all proposals;
 - withdraw or cancel the RFP;
 - postpone proposal opening for its own convenience.
 - right to investigate the qualifications of any Offeror and/or require additional evidence of qualifications.
- Proposals received are considered public information.
- Proposals are not to be copyrighted.

Proposal Submittal Instructions (continued)

- Contract type will be firm-fixed monthly rates to provide the services identified in the scope of work, Exhibit A.
- Conflict of interest
- Code of conduct

Proposal Content

(Refer to RFP Section II)

- Letter of Transmittal
- Technical Proposal
 - a) Qualifications of the Firm and Staffing
 - b) Work plan
 - c) Exceptions / Deviations (Technical vs. Contractual)

Proposal Content (continued)

- Cost and Price Proposal – Exhibit B
 - Offeror shall submit proposed pricing to provide services described in Exhibit A, Scope of Work
 - The Offeror shall sign and complete the “Price Summary Sheet” form included with this RFP (Exhibit B)
 - No alternations to the form are allowed

Proposal Content (continued)

- Forms
 - Status of Past and Present Contracts Form – Exhibit D
 - Campaign Contributions Disclosure Form – Exhibit E
 - Proposal Exceptions and/or Deviations Form – Exhibit G

Note: Forms excluded from 50-page proposal limit.

Evaluation and Award

(Refer to RFP Section III)

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

Qualifications of the firm and staffing	40%
Work plan	30%
Cost and price	30%

Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interview in Washington D.C.
- Interviews are scheduled for **September 17, 2024.**
- Offerors are requested to keep this date available.

Award

- Award Process
 - Evaluation Committee recommends highest ranking Offeror to the Legislative and Communications (L&C) Committee.
 - L&C Committee makes recommendation to BOD.
 - BOD may accept / reject recommendation.
 - 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 this project
- Exceptions/Deviations
 - Any exceptions and/or deviations must be identified in Exhibit G, Proposal Exceptions and/or Deviations form



Proposed Agreement (continued)

- Offerors are encouraged to review:
 - Article 4 – Term of Agreement (two-year initial term, two, two-year option terms)
 - Article 5 – Payment
 - Article 6 – Maximum Obligation
 - Article 9 – Insurance

Scope of Work

(Refer to RFP Exhibit A)

Lance Larson – Executive Director, Government Relations
Kristin Jacinto – Department Manager, Government Relations

Project Overview and Scope of Work

- Questions?



- Reminder.... **Proposals are due @ 2:00 p.m. on August 12, 2024.**
- Please leave a business card.
- Please register on CAMM NET.
- Thank you for your interest in OCTA!