



AFFILIATED AGENCIES

*Orange County
Transit District*

*Local Transportation
Authority*

*Service Authority for
Freeway Emergencies*

*Consolidated Transportation
Service Agency*

*Congestion Management
Agency*

October 28, 2024

**SUBJECT: Request for Proposals (RFP) 4-2411
“Bus and Rail Operations Scheduling Support Services”**

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 a copy of the pre-proposal conference presentation is presented as Attachment A to this Addendum No. 1.
2. **Offerors who plan to attend the pre-proposal conference remotely are requested to submit via e-mail to gvalle@octa.net, no later than Tuesday, October 29, 2024 at 5pm, 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.

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", is written over a blue horizontal line.

Gustavo Valle
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 4-2411

Bus and Rail Operations Scheduling Support Services



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:

October 31, 2024

OCTA Responds:

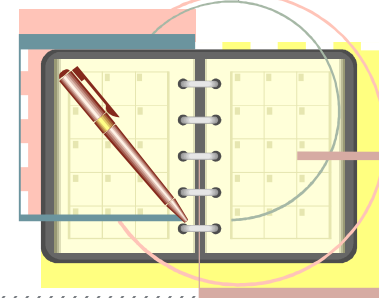
November 6, 2024

Proposals Due:

November 14, 2024, 2:00 PM

Interviews:

October 5, 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 Local funds

Guidelines for Written Questions

- Questions must be submitted directly to Gustavo Valle, Contract Administrator, in writing, by: **October 31, 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., **November 14, 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) Cost
 - e) Exceptions / Deviations (Technical vs. Contractual)

Proposal Content (continued)

Forms:

- Exhibit C – Proposed Agreement (not submitted with proposal)
- Exhibit D – Status of Past and Present Contracts
- Exhibit E – Safety Specifications (not submitted with proposal)
- Exhibit F – Proposal Exceptions and/or Deviations

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	35%
Staffing and Project Organization	25%
Work Plan	25%
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 **December 5, 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 – Payment
 - Article 9 – Insurance
 - Article 27 – Health and Safety Requirements

Scheduling Support Scope of Work

Scope of Work

Gail Cherry
Section Manager II

Project Overview and Scope of Work

Scheduling Scope of Work

Background

Orange County Transportation Authority (OCTA) operates a 55-route fixed route service, OC Bus, in Orange County, California. The service is operated out of four bus bases, two of which are directly operated by OCTA, and two of which are operated by OCTA's contractor, Keolis Transportation. OCTA's scheduling section is responsible for schedule writing, running time analysis, vehicle blocking, and export generation for service at all four bases. Keolis develops the run cut and roster for service at their bases, and OCTA's scheduling section does the same for the directly operated bases.

Scheduling Scope of Work (continued)

OCTA's scheduling section consists of a manager, two schedule analysts, one senior schedule analyst, and one principal schedule analyst. The scheduling tasks are done in HASTUS. Schedule analysts use AVL data, ridership data, customer comments, operator comments and field observations as input for schedule writing and creating running times.

Scheduling Scope of Work (continued)

There are four service changes per year. OCTA supplements regular service with approximately 30 school trippers operated when schools are in session. OCTA is responsible for scheduling and operating service with scheduled connections to the region's commuter rail service, Metrolink.

OCTA is building a streetcar line that is scheduled to begin revenue service in late 2025. OCTA's scheduling section will be responsible for using HASTUS for schedule writing and vehicle blocking for the service.

Scheduling Scope of Work (continued)

Project Description

OCTA seeks consultant support to train, evaluate processes and make recommendations, and augment staff duties related to HASTUS. OCTA seeks to optimize use of HASTUS for scheduling. It is anticipated the consultant will review current practices and offer solutions to maximize the efficiency of HASTUS in meeting Collective Bargaining Agreement requirements. This may include creating and adjusting Rules, Attributes and Parameters for MINBUS, Crew Opt and Roster. It also may include creating and editing OIGs. In preparation for the opening of OC Streetcar, OCTA seeks support to schedule the system in HASTUS and optimize transfers between designated OC Bus routes and the OC Streetcar.

Scheduling Scope of Work (continued)

Work Proficiency

The selected consultant must be proficient in HASTUS software. The consultant should demonstrate successful support of transit agency scheduling staff using HASTUS modules. The consultant shall demonstrate the ability to create training curriculum specific to the needs of a transit agency's operating environment, constraints and Collective Bargaining Agreement. The consultant should demonstrate the ability to review current scheduling practices and recommend improvements to maximize efficient use of HASTUS scheduling software to meet collective bargaining agreement requirements.

Scheduling Scope of Work (continued)

Project Schedule/Tasks

Work under this contract will be assigned on an as-needed basis, not to exceed the contract authority. Tasks may fall under the following categories:

1. HASTUS Training
 - a. Training on all modules in HASTUS that OCTA has access to (Schedule Writing, MINBUS, Crew Opt., Roster, ATP).
 - i. Training may be focused on all levels of proficiencies: beginner, intermediate, and advanced.

Scheduling Scope of Work (continued)

Project Schedule/Tasks (continued)

2. Scheduling Support

- a. Review OCTA's current scheduling practices for booking creation, running time analysis, schedule writing, vehicle blocking, crew, roster, exports, and report generation along with the collective bargaining agreement and make recommendations for more efficient and effective use of HASTUS.

3. Scheduling Scenarios

- a. Contractor will run scheduling scenarios for blocking, run cutting, and rostering.

4. Staff Support

- a. Consultant will support scheduling with regular duties as needed.

Scheduling Scope of Work (continued)

Administration

The consultant shall assign a dedicated project manager at the time of contract award. The project manager shall be responsible for the activities as defined in the scope of work. The consultant shall assign key personnel who will perform tasks assigned. No other individuals shall replace the project manager or key personnel without prior OCTA approval.

Scheduling Scope of Work (continued)

Location

All Project Tasks will be completed remotely by the consultant. No travel is required or authorized under this contract.

Contract Term

The term of this contract is three years, with one two-year option term.

Limitation on Governmental Decisions

Nothing contained in this scope of work permits CONSULTANT's personnel to authorize or direct any actions, votes, appoint any person, obligate, or commit AUTHORITY to any course of action or enter into any contractual agreement on behalf of AUTHORITY. In addition, CONSULTANT's personnel shall not provide information, an opinion, or a recommendation for the purpose of affecting a decision without significant intervening substantive review by AUTHORITY personnel, counsel, and management.

- Questions?



- Reminder.... Proposals are due @ 2:00 pm on November 14, 2024
- Please submit a completed registration sheet
- Please register on CAMM NET



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP No. 4-2411

RFP 4-2411
ADDENDUM NO. 1
EXHIBIT B
Date: October 29, 2024

Title: RFP 4-2411 Bus and Rail Operations Scheduling Support 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: _____