



October 15, 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) 4-2555
“E-Procurement Solution”**

All Offerors:

This letter shall serve as Addendum No. 1 to the above RFP issued by the Orange County Transportation Authority (OCTA). Offerors are reminded that the proposal submittal date is at or before **2:00 p.m., October 31, 2024.**

Offerors are advised of the following:

- Written questions submitted by October 9, 2024, and OCTA's responses are presented as Attachment A to this Addendum No. 1.

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 lmartinez1@octa.net.

Sincerely,

Luis Martinez

Luis Martinez

Senior Contract Administrator

Contracts Administration and Materials Management

No.	Question	OCTA's Response
1	Does the budget include services, or just licenses for solution?	The budget for this project is inclusive of services and licenses.
2	How much are you considering a COTS or turnkey solution?	Please refer to Exhibit A, "Scope of Work" and Attachments.
3	What financial systems are you using currently?	Finance Enterprise (CentralSquare, OneSolution)
4	What integrations will you need?	Please refer to Attachment F, "System Interfaces and Data Exchanges".
5	What metrics are tied to business outcome? How are they measured?	Test Plan, User Acceptance Testing and Requirements Traceability Matrix.
6	What are the business implications of not moving from your current system/processes?	Please refer to page 2 of 26 of the Scope of Work, Section 1. "Background".
7	Are these features desired in your new solution? 1) Sourcing & Procurement, Supplier Lifecycle, and Accounts Payable operations? This includes procurement case management, shopping hub, sourcing and purchasing automation, ERP integration framework, platform analytics advanced, virtual agent, supplier collaboration portal, invoice case management?	Please refer to Attachment C, "System Requirements List" of the Scope of Work.
8	What SSO do you currently utilize?	OCTA does not utilize single sign-on.
9	What is driving the replacement of your current e-procurement system?	Please refer to page 2 of 26 of the Scope of Work, Section 1. "Background".
10	What IT ticketing system are you currently using?	OCTA utilizes Mantis for logging defects and tasks.
11	Would OCTA purchase before the year's end?	OCTA is looking to award a contract by December 31, 2024.
12	What kind of reports is OCTA looking to generate?	Please refer to Attachment E, "System Reports".
13	Total number of vendors? (is this the 300-400 that was mentioned)	There is no limit to total number of vendors. The 300-400 number is referring to the total number of users for the software solution.
14	What is your existing technology infrastructure like?	Please refer to Attachment H, "System Topology Diagram" for an overview of OCTA's current and future state system interfaces.
15	Are there any specific systems or platforms that our solution needs to integrate with as part of your go-live? Post go-live?	Please refer to response to Question No. 4.
16	What is the volume of Contract data that needs to be migrated to our solution?	OCTA wishes to bring a historical record of closed contracts, POs, and closed solicitations into the new system. At minimum, three (3) years are required for triennial auditing. Approximate counts for three (3) years of data: 2400 solicitations, 900 contracts, 10,000 POs.
17	Are there any specific data formats or structures we need to be aware of?	Vendor shall clearly describe the capacity to import and export data through, at a minimum, XML and CSV formats.
18	Where does the data currently reside? (please specify the format)	Please refer to page 2 of 26 of the Scope of Work, Section 1. "Background".
19	How many contract templates will you want in the system?	OCTA has a minimum of 15 templates currently in use.
20	How many unique approval workflows do you have?	OCTA has not identified unique approval workflows.
21	What is your desired timeline for implementing our solution?	one (1)-Year software solution delivery.
22	Are there any critical deadlines or milestones we should be aware of?	Nothing in addition to what is in the Scope of Work.
23	What is the size and implementation experience of your team working on the implementation.	Senior Level Experience in all aspects of project management and analytics
24	Do you prefer an implementation partner? If so, please describe the partner relationship. Agiloft Service Partners	Consultant shall be responsible for the implementation / deployment of the application into a Production Environment for OCTA to use it as a production system.
25	Have you identified an Administrator for the CLM?	Yes, OCTA has identified an administrator for the contract lifecycle management application.
26	Do you want a quote for a "Train the Trainer" approach or "Train the Employees" approach?	Provide training, Train the Trainer, End User Training according to the Scope of work, Section 2. "Project Goals/Objectives and High-Level Project Scope".
27	Are there any specific training requirements or preferences for your team?	Refer to pages 13 and 14 of 26 of the Scope of Work, Task 6 - "Training" and Sub-category/Procedure category "Documentation/Training" of the Attachment C, "Requirements List".
28	How do you typically conduct User Acceptance Testing?	User acceptance testing (UAT) is final phase of the software testing process where the intended users of the system validate the software by ensuring it meets the business needs, requirements, and expectations. UAT is performed after system, integration, and functional testing have been completed and the application or component is considered stable and fully functional. UAT should address all of the functional requirements listed in the Requirements Traceability Matrix.
29	Are there specific criteria or scenarios that should be included in the testing process?	Yes, those will be identified in the test cases and test scripts.
30	Based on your experience, what challenges do you foresee during the implementation process?	OCTA does not foresee any challenges at this point.
31	Are there any past issues with similar implementations that we should be aware of?	No.
32	Are there any competing implementation projects that could draw resources away from this implementation?	Please refer to pages 4 and 5 of 26 of the Scope of Work, Section 3. "OCTA Resources".
33	How does the CLM solution fit into your existing business processes?	Please refer to response to Question No. 14.
34	Are there any potential conflicts or areas of overlap that need attention?	Please refer to response to Question No. 14.
35	What level of ongoing support and maintenance do you anticipate needing after the initial implementation?	Please refer to pages 16 and 17 of 26 of the Scope of Work, Task 8 - "Post-Deployment Support/Warranty" and sub-category/process "License, Maintenance and Support, and Hosting" of Attachment C.
36	Are there specific service level expectations or requirements?	Please refer to pages 16 and 17 of 26 of the Scope of Work, Task 8 - "Post-Deployment Support/Warranty".
37	How will you measure the success of the implementation?	Requirements Traceability Matrix.
38	Are there specific key performance indicators (KPIs) or success metrics that we should focus on?	Nothing in addition to what is listed in the Scope of Work.
39	Can you please provide additional information on 'Location Demographics table' in questions 297 and 333; and OCTA "IS Preferred Standards & Practices" in questions 257 and 265. These are both referenced in the requirement matrix, but did not see any relevant attachments or information.	In Attachment C, "System Requirements List", for ID No. 297 please refer to Attachment G, "System Performance Requirements". For ID No. 333 it is one location. For ID Nos.257 and 265 there is no additional information.

40	Does the pricing for year 1 include implementation services? Or is it only for software/licensing/subscription? (\$241,691 for a one-year initial term)	The pricing for Year 1 includes implementation and software/licensing/subscription.
41	What environment is OCTA's On-Premises Financial application(s)?	Off-Site Data Center.
42	What is OCTA's data warehouse environment?	Off-Site Data Center.
43	Is there a specific functionality OCTA is looking for in regards to "asset management functionality consistent with Federal DOT guidelines for transit organizations"? If none, we respectfully request eliminating this requirement.	ID No. 234 is hereby removed as a requirement from Attachment C, "System Requirements List".
44	What is the anticipated go-live date, or what is the expected timeline between the contract award and the go-live date?	Please refer to response to Question No. 21
45	Can you provide more details on requirement (151), specifically regarding the circumstances under which OCTA would need to restrict certain vendor responses, and the reasoning behind this requirement?	For example, OCTA can not do business with a firm that is debarred or appears on a federal government sanctions list.
46	Can the calendar of events be presented as a list view that can be toggled based on priority, due date, or assigned personnel?	Yes.
47	Attachment A of Exhibit A lists Task 6 as "Pilot Plan and Pilot Acceptance," but Task 6 in the RFP skips directly to training. Could you clarify if there is a pilot phase associated with this project?	No, there is no pilot phase. Task 6 is Training.
48	Does OCTA have a subscription to an electronic signature software provider?	Yes, Adobe Sign.
49	How many contracts will be imported from OCTA's legacy database to the new system?	Please refer to Question 16.
50	Does OCTA require a product to facilitate purchase requests from various departments to the Procurement Dept?	It is not required but listed as a "Preferred/Nice to Have" in Attachment C, Requirements List".
51	I didn't see anything about the number of users that need access to the software. Do you have a number for that yet?	Yes, 300-400 with 30-50 concurrent users.
52	Since Pavilion is a no-cost tool, agencies don't have to procure us to use us! We are already available for you and the whole OCTA team to use. In fact, it looks like several of your colleagues are already using Pavilion to find piggybackable contracts.	OCTA is conducting a competitive procurement. Any firm that would like to be considered for contract award must submit a proposal as instructed in this RFP 4-2555.