



AFFILIATED AGENCIES

*Orange County
Transit District*

*Local Transportation
Authority*

*Service Authority for
Freeway Emergencies*

*Consolidated Transportation
Service Agency*

*Congestion Management
Agency*

January 22, 2025

**SUBJECT: Request for Proposals (RFP) 4-2654
“Plans, Specifications, and Estimates for Improvements to OCTA
Headquarters Property”**

Gentlemen/Ladies:

This letter and its Attachments comprise **Addendum No. 2** to the above captioned Request for Proposals (RFP) issued by the Orange County Transportation Authority (“Authority”).

1. Offerors are advised to disregard Addendum No. 1, which was posted on CAMM Net on January 21, 2025, which in error included a copy of the original RFP document rather than the addendum. **No change was made to the RFP document that was issued on January 13, 2025, at this time.** Addendum No. 1 is not being used for this RFP. Addendum No. 2 is the first addendum to this RFP.
2. Offerors are advised that an in-person/on-site pre-proposal conference will be held on January 23, 2025 at 10:30 a.m., at the Authority’s Administrative Offices, 550 South Main Street, Orange, California in Conference Room 09. All prospective Offerors are encouraged to attend the pre-proposal conference.

Participation via teleconference will also be available. Prospective Offerors may join or call-in using the following credentials:

Microsoft Teams meeting

[Join the meeting now](#)

Call-in Number: 916-550-9867

Conference ID: 303 743 849#

3. Offerors are advised that a copy of the pre-proposal conference PowerPoint presentation is presented as Attachment A to this **Addendum No. 2.**
4. Offerors who plan to attend the pre-proposal conference remotely are requested to submit via email to mthreats@octa.net , no later than Thursday, January 23, 2025, by 4:00 p.m. the Pre-Proposal Conference

January 22, 2025

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Registration Sheet which is presented as Attachment B to this
Addendum No. 2.

Offerors are reminded to acknowledge receipt of **Addendum No. 2** in their Letter of Transmittal, which is to accompany the proposal. Offerors are advised that all changes addressed in this **Addendum No. 2** shall be incorporated into the final Agreement.

Questions regarding this **Addendum No. 2** should be directed to the undersigned at 714-560-5552 or mthreats@octa.net

Sincerely,



Marjorie Morris Threats
Principal Contract Administrator
Contracts Administration and Materials Management

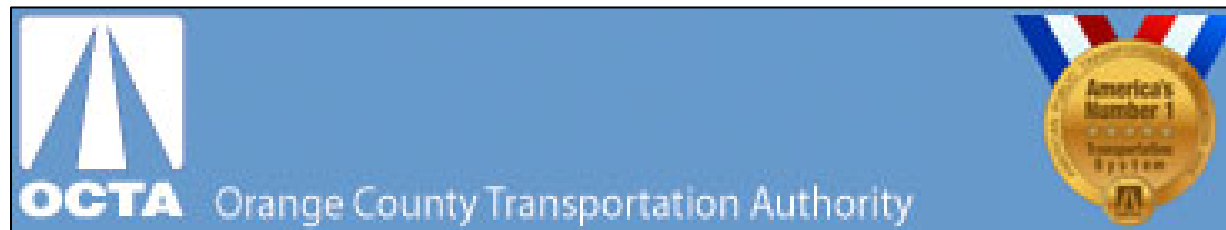
Attachments:

Attachment A: Pre-Proposal Conference Presentation

Attachment B: Pre-Proposal Conference Registration Sheet

Pre-Proposal Conference for **RFP 4-2654**

Plans, Specifications, And Estimates for Improvements to Orange County Transportation Authority's Headquarters Property



Agenda

- Introductions
- Safety/Emergency Evacuation
- Online Business and Networking Tools
- Key Procurement Information & Dates
- Review of RFP Documents
- Scope of Work
- Questions and Answer



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:

January 29, 2025

OCTA Responds:

February 5, 2025

Proposals Due:

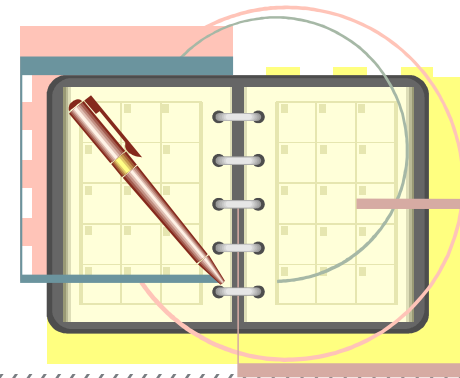
February 13, 2025, 2:00 PM

Interviews:

March 18, 2025

Board of Directors Meeting:

May 12, 2025



Key Procurement Information

- All questions/contact with Authority staff should be directed to the assigned Contract Administrator Marjorie Morris-Threats
- Next Addendum will contain a copy of the Pre-Proposal sign-in sheets and today's presentation
- Award based on prime-sub relationship, not joint ventures
- Contract term is for 24 months
- Funded with Local Transportation Funds

Guidelines for Written Questions

- Questions must be submitted directly Marjorie Morris-Threats, Principal Contract Administrator, in writing, by: **January 29, 2025, 5:00 p.m.**
- E-mail recommended: mthreats@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 are non-binding

Next...
Proposal Instructions

Followed by...
Review of Scope of Work

Proposal Submittal Instructions

- Proposals are due by 2:00 p.m., February 13, 2025
- Proposals are to be submitted electronically as specified in the RFP
- Hard copies of proposals will not be accepted by the Authority 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) Exceptions / Deviations

Proposal Content (continued)

Cost and Price Proposal

- Only technical qualifications are to be submitted at this time
- No cost/price information is to be submitted
- Only highest ranked Offeror will be asked to submit a detailed cost proposal
- Negotiations will commence based on both the cost and technical proposals

Proposal Content (continued)

Forms:

- Exhibit C – Campaign Contribution Disclosure Form
- Exhibit C – Status of Past and Present Contracts
- Exhibit C – Proposal Exceptions and/or Deviations
- Exhibit D – Safety Specifications (do not submit with proposal)

Note: Forms excluded from 50-page proposal limit.

Evaluation and Award

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

1.	Qualifications of the firm	20%
2.	Staffing and Project Organization	40%
3.	Work Plan	40%

- Evaluation Committee comprised of internal OCTA staff

Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interview
- Interviews are scheduled for **March 18, 2025**
- Offerors are requested to keep this date available

Award

- Award Process

- Evaluation Committee recommends highest ranking Offeror to the Finance & Administration (F&A) Committee
- F&A Committee makes recommendation to Board of Directors (BOD)
- BOD may accept/reject staff and F&A Committee's recommendation
- All firms submitting a proposal will be notified of Award via CAMM NET

Proposed Agreement

- Proposed Agreement
 - Please review the Proposed Agreement (Exhibit B) so you are aware of the contractual requirements of the solicitation
- Exceptions
 - Any exceptions/deviations must be identified in Exhibit C – Proposal Exceptions and/or Deviations Form and submitted with the proposal



Proposed Agreement

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

Scope of Work

Scope of Work

Sean Murdock

Project Manager

Project Overview and Scope of Work

Scope Of Work

- OCTA has purchased the property located at 2677 North Main Street that will serve as its future administrative headquarters
- The property includes a ten-story office tower as well as surface parking and a parking garage
- The building will house employees and consultants at the current headquarters location and given the size of the building OCTA will also retain tenants on certain floors
 - OCTA anticipates occupying ~ 165,000 sf of the building
 - No renovations for existing tenants are included as part of this project

Scope Of Work

- OCTA needs to construct a new Board/Conference room facility
 - To be constructed as an add-on to the office tower and will extend into the surface parking area
 - Dias to seat 18-member board plus the CEO and General Counsel
 - Audience seating for 240 plus lobby, restrooms, kitchenette, media room, AV room, and storage room
 - Ability to partition the area into large conference rooms
- OCTA needs to rehabilitate and modernize the office tower
 - Floor renovations for 7.5 of the 10 floors, which will include demo and construction of offices, conference rooms, and remodels of bathrooms
 - Likely includes replacement/upgrade of some core mechanical equipment

Scope Of Work

- OCTA seeks design, planning, architecture and engineering services to support the construction of the new Board/Conference Facility and improvements to office tower and parking areas as needed
- OCTA's target is late 2027 completion of all construction
 - OCTA's current lease expires January 2029
- Would pursue both the new construction (Board/Conference Room) and officer tenant improvements to be run in parallel
- OCTA anticipates separate procurements for new construction and the office tower improvements

Vendor Video Training

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

- Questions?



- Reminder.... Proposals are due @ 2:00 pm on February 13, 2025
- Please sign in and leave a business card
- Please register on CAMM NET
- Thank you for your interest in OCTA! Feel free to stay and network.



PRE-PROPOSAL REGISTRATION

ATTACHMENT B

RFP 4-2654

Date: January 23, 2025

Title: Plans, Specifications, and Estimates for Improvements to OCTA Headquarters Property

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: _____