



BOARD OF DIRECTORS

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

April 4, 2025

NOTICE TO ALL OFFERORS

Gentlemen/Ladies:

**SUBJECT: Request for Proposals (RFP) RFP 5-3898  
Oversight Services for the 405 Express Lanes Back Office  
System/Customer Service Center Operations**

This letter shall serve as **ADDENDUM No. 1** to the above subject Request for Proposal (RFP) issued by the Orange County Transportation Authority (OCTA).

**A. Response to questions received from Offerors by April 2, 2025:**

Will OCTA be making available in non-PDF format the forms for submittal?

Answer: No, the required forms will remain in their original PDF format.

**B. Offerors are advised the pre-proposal PowerPoint presentation and conference registration sheets are attached to this Addendum as Attachment A.**

Offerors are reminded to acknowledge the receipt of this Addenda No. 1 in the Letter of Transmittal and in Exhibit B entitled "Price Summary Sheet".

Questions regarding this Addendum No. 1 should be directed to the undersigned at (714) 560-5631.

Proposals are due **at or before 2:00pm. on April 14, 2025.**

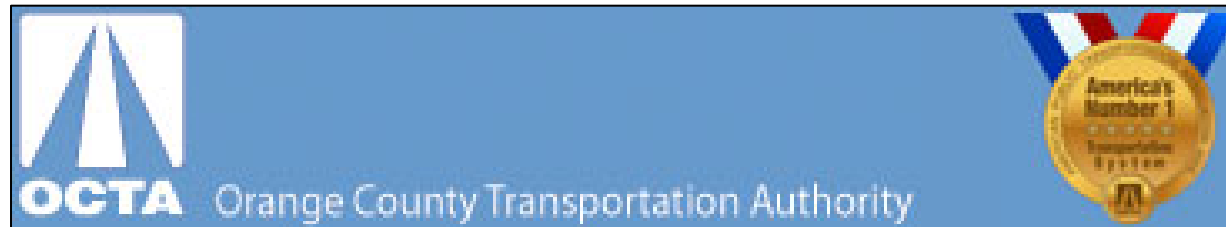
Sincerely,

Sue Ding  
Sr. Contract Administrator  
Contracts Administration and Materials Management

# **Pre-Proposal Conference for**

**RFP 5-3898**

## **OVERSIGHT SERVICES FOR THE 405 EXPRESS LANES BACK OFFICE SYSTEM/CUSTOMER SERVICE CENTER OPERATIONS**





# Agenda

- Introductions
- Purpose of Pre-Proposal Conference
- Review of RFP Documents
- Review of the Scope of Work
- Questions and Answers





# CAMM NET Registration

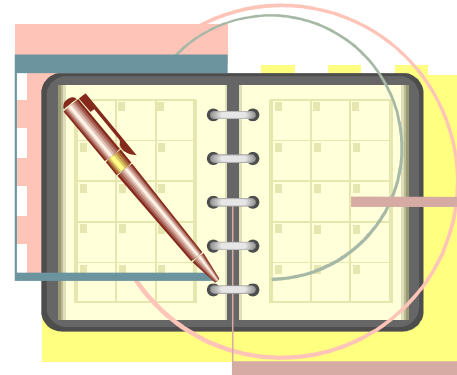
Why register on CAMM NET?

**<https://cammnet.octa.net>**

- To receive e-mail notifications of Solicitations, Addenda and Awards
- View and update your vendor profile
- Required for Award

# Key Procurement Dates

- Written Questions Due: April 2, 2025
- OCTA Responds: April 4, 2025
- Proposals Due: April 14, 2025  
@ 2:00 pm, **Pacific Time (PT)**
- Vendor Interview April 29, 2025



# Key Procurement Information

- Questions must be submitted directly to Sue Ding, Sr. Contract Administrator, in writing, by **April 2, 2025, before 4:00 p.m. PT**
- E-mail recommended: [sding@octa.net](mailto:sding@octa.net)
- Any changes Authority makes to procurement documents will be by written Addenda only
- Addenda will be issued via CAMM NET
- Next Addendum will contain a copy of the Pre-Proposal sign-in sheet and today's presentation
- Award based on prime-sub relationship, not joint ventures.

# Proposal Submittal Instructions

- Proposals are due by 2:00 p.m. PT, April 14, 2025.
- **Proposals must be submitted electronically through the URL link: <https://www.octa.net/Proposal Upload Link> at or before 2:00 p.m. PT, on April 14, 2025.**

**Select “RFP 5-3898” from the drop-down menu and follow the instructions as prompted.**

**Hard copy proposal submission will not be accepted for this RFP. Proposals must be submitted electronically at the link stated above and by the date and time as indicated**



# 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
- Contract type is a time-and-expense price contract specifying a firm-fixed fully-burdened hourly rate and unit rate for work specified in the Scope of Work, included in the RFP as Exhibit A. This contract will have a fifteen (15)-month contract term.

# Proposal Submittal

- CONTRACT TERM WILL BE EFFECTIVE JULY 1, 2025, THROUGH SEPTEMBER 30, 2026, FOR A FIFTEEN (15)-MONTH CONTRACT TERM.
- ANY EXCEPTIONS MUST BE IDENTIFIED IN THE EXCEPTION/DEVIATION SECTION OF THE PROPOSAL AND ON EXHIBIT G, PROPOSAL EXCEPTIONS AND/OR DEVIATIONS

# 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 and Price
  - e) Exceptions / Deviations (Technical vs. Contractual)



## FORMS SUBMITTAL

**EXHIBIT B**

**PRICE SUMMARY SHEET**

**EXHIBIT D**

**STATUS OF PAST AND PRESENT CONTRACTS FORM**

**EXHIBIT E**

**CAMPAIGN CONTRIBUTION DISCLOSURE FORM**

**EXHIBIT G (IF NEEDED)**

**PROPOSAL EXCEPTIONS AND/OR DEVIATION**



<b>EVALUATION FACTORS</b>	<b>EVALUATION WEIGHTING</b>
<b>A) QUALIFICATIONS, RELATED EXPERIENCE AND REFERENCES OF OFFEROR</b>	<b>25%</b>
<b>B) PROPOSED STAFFING AND PROJECT ORGANIZATION</b>	<b>30%</b>
<b>C) WORK PLAN</b>	<b>20%</b>
<b>D) COST AND PRICE</b>	<b>25%</b>

# Award

## Award Process

- Evaluation Committee recommends highest ranking Offeror to Finance and Administration (F&A) Committee
- F&A Committee makes recommendation to Board of Directors (BOD)
- BOD may accept/reject staff'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 C) so you are aware of the contractual requirements of the project
- Exceptions
  - Any exceptions must be identified in Exhibit G – Proposal Exceptions and/or Deviations Form



# Scope of Work

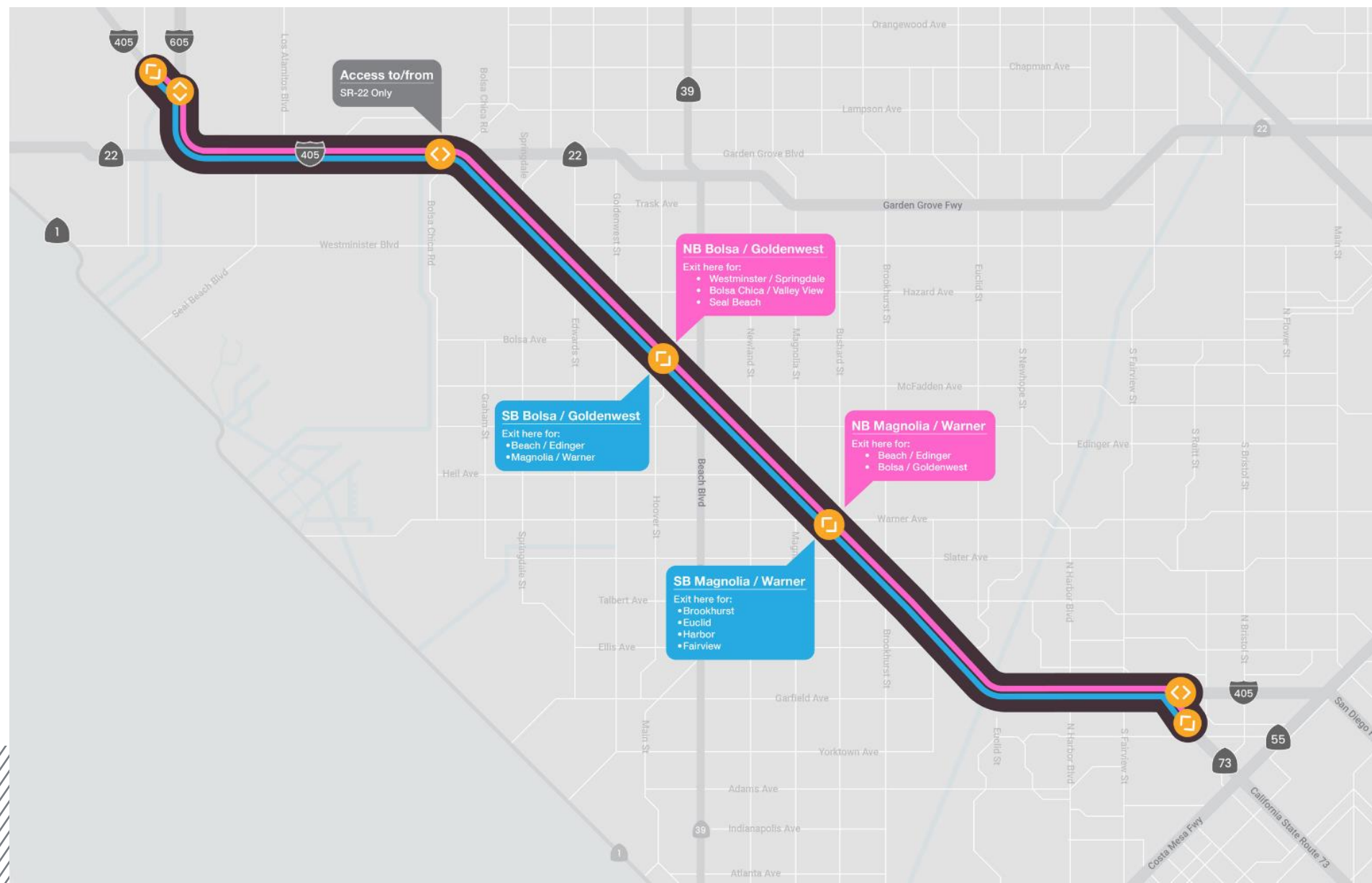
(Refer to RFP Exhibit A)

**Ellen Lee**  
**Project Manager**

Project Overview and Scope of Work



# 405 Express Lanes



- Opened on December 1, 2023
- 2 express lanes in each direction across 14-miles of Interstate 405
- 7 access points along Interstate 405
- Tolls based on length of segments and demand
- Toll-free travel for various categories of vehicles

# 405 Express Lanes BOS/CSC Operations

- In Jan 2022, agreement executed with WSP USA Services Inc (WSP)
  - WSP provides Customer Service Center operations
  - Electronic Transaction Consultants, LLC (ETC) provides BOS tolling application
- Hardware and software monitoring and maintenance
- Telephone system and other customer contact systems
- Violations processing and collections
- Customer account management
- Payments and other mail processing
- Revenue collections and transaction processing
- Financial management, reconciliation, and settlement
- Transponder inventory management

# Scope of Work

- Tolling Consultant:
  - Oversight of BOS/CSC Operations Design and Development
    - Participate in design review meetings, workshops, system demos, testing
    - Review Contractor documentation and deliverables
  - Project Support of Production BOS and CSC Operations
    - Oversee software updates
    - Facilitate Key Performance Indicators reviews
    - Participate/Coordinate meetings among multiple parties, including Lane System Integrator, California Toll Operators Committee agencies, etc.,

- Questions?



# Proposal Submission

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<https://www.octa.net/Proposal Upload Link> at or before 2:00 p.m. PT on **April 14, 2025. Select “RFP 5-3898” from the drop-down menu and follow the instructions as prompted.**
- **Hard copy proposal submission will not be accepted for this RFP**
- **Please send me an email with your contact information at [sding@octa.net](mailto:sding@octa.net) as today’s sign-in registration.**
- **Please register on CAMM NET**

## ***PRE-PROPOSAL CONFERENCE REGISTRATION***

**RFP #:** 5-3898

**Date:** March 27, 2025

**Title:** Oversight Services for the 405 Express Lanes Back Office  
System/Customer Service Center Operations

<b>Attendee</b>	<b>Company</b>	<b>Email/Phone Number</b>
Scott Doering	Big Sky Partners, LLC	scott.doering@gmail.com 760-520-3796
Dan Baker	HNTB Corporation	dlbaker@hntb.com 303-210-0354
Tristen Eaton	HNTB Corporation	eaton@hntb.com 801-326-9117