



*AFFILIATED AGENCIES*

*Orange County  
Transit District*

*Local Transportation  
Authority*

*Service Authority for  
Freeway Emergencies*

*Consolidated Transportation  
Service Agency*

*Congestion Management  
Agency*

March 5, 2025

**SUBJECT: Request for Proposals (RFP) 5-3930  
"Paratransit and Microtransit Services"**

Gentlemen/Ladies:

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 registration sheet is presented as Attachment A to this Addendum No. 1.
2. Offerors are advised that a copy of the pre-proposal conference 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 714-560-5314 or [mle1@octa.net](mailto:mle1@octa.net).

Sincerely,

Michael Le  
Senior Contract Administrator  
Contracts Administration and Materials Management

Attachments:

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

## PRE-PROPOSAL CONFERENCE REGISTRATION

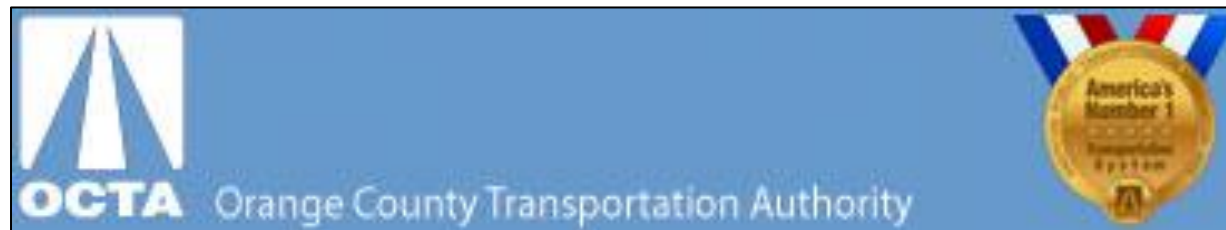
**RFP #: 5-3930**

**Date: March 4, 2025**

**Title: Paratransit and Microtransit Software**

Company Name	Attendee	Email Address / Phone Number
RideCo	Cody Cornwell	Cody.Cornwell@rideco.com 720-229-7485
Onward	Dominc Buono	dominic.buono@onwardrides.com
Onward	Kim Petty	kim.petty@onwardrides.com 312-485-3484
Uber	Lucia Phan	luciap@uber.com
Via Transportation	Alex Rodman	alex.rodman@ridewithvia.com

# Pre-Proposal Conference for RFP 5-3930 Paratransit and Microtransit Software



# 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:

March 12, 2025

OCTA Responds:

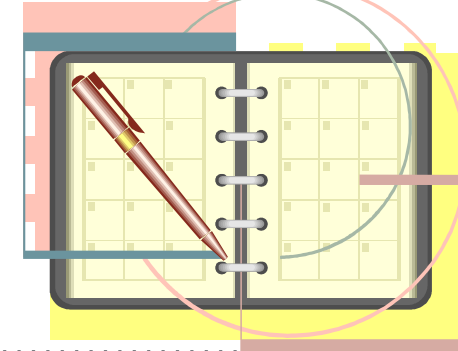
March 19, 2025

Proposals Due:

April 7, 2025, 2:00 PM

Interviews:

May 7, 2025



# Key Procurement Information

- Questions must be submitted directly to Michael Le, Contract Administrator, in writing, by: **March 12, 2025, 5:00 p.m.**
- E-mail recommended: [mle1@octa.net](mailto:mle1@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
- Award based on prime-sub relationship, not joint ventures



Next...  
Proposal Instructions

Followed by...  
Review of Scope of Work

# Proposal Submittal Instructions

- Proposals are due by 2:00 p.m., **April 7, 2025**
- Proposals and Business Requirements Workbook (Attachment A) must be submitted electronically through the URL link: <https://www.octa.net/Proposal Upload Link> at or before 2:00 p.m., on April 7, 2025.
- Select “RFP 5-3930” from the drop-down menu and follow the instructions as prompted.
- The Authority will not accept hard copy proposals for this RFP.

# Proposal Submittal Instructions

- Combine Proposal and Business Requirements Workbook (Attachment A) into a single ZIP file and upload the ZIP file.
- Please leave the Business Requirements Workbook (Attachment A) as an Excel file when submitting.
- The link has an upload file size limit of 80MB.

# 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 firm-fixed price contract specifying firm-fixed price for tasks specified in Exhibit A, Scope of Work.

## Contract Term

Initial Term: Two years, September 1, 2025 through August 31, 2027

Option Term: Five years, September 1, 2027 to August 31, 2032

PROD System date: September 1, 2026

# 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 (Technical vs. Contractual)

# Proposal Content (continued)

## Forms:

- Exhibit B – Price Summary Sheet
- Exhibit D – Status of Past and Present Contracts Form
- Exhibit E – Campaign Contribution Disclosure Form
- Exhibit G – Proposal Exceptions and/or Deviations

*Note: Forms excluded from 100-page proposal limit.*

# Evaluation and Award

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

Qualifications of the firm	25%
Staffing and project organization	20%
Work plan	30%
Cost and Price	25%



# Evaluation and Award

- “Short-Listed” firms will be invited to interview
- Interviews are scheduled for **May 7, 2025**
- Offerors are requested to keep this date available

- Award Process

- Evaluation Committee recommends highest ranking Offeror to Transit Committee
- Transit 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 solicitation
- Exceptions
  - Any exceptions/deviations must be identified in Exhibit G – Proposal Exceptions and/or Deviations Form and submitted with the proposal



# Scope of Work

Jack Garate

Department Manager, Specialized Transit Services

Project Overview and Scope of Work

# SCOPE OF WORK – OBJECTIVES

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- Implement a robust Software-as-a-Service (SaaS) solution
- Enhance scheduling, route optimization, dispatching, and trip booking features
- Integrates OC ACCESS, Same Day Taxi, and Senior Mobility Program
- Enable cashless payment integration
- Improve system performance and reporting analytics

# SCOPE OF WORK – TASKS AND DELIVERABLES

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- Project Planning and Management
- Requirements Gathering and System Design
  - Business and Technical
- Software Installation and Configuration
- System Testing and User Acceptance
  - Unit and Integration Testing
- Training and Documentation
- Deployment and Post-Implementation Support

- Questions?



- Reminder.... Proposals are due @ 2:00 pm on April 7, 2025
- Proposals and Business Requirements Workbook (Attachment A) must be submitted electronically through the URL link: <https://www.octa.net/Proposal Upload Link> at or before 2:00 p.m., on April 7, 2025.
- Select “RFP 5-3930” from the drop-down menu and follow the instructions as prompted
- Please submit a completed registration sheet
- Please register on CAMM NET