



May 19, 2025

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) 5-3964
“Claims Administration of the Self-Insured Workers’
Compensation Program”**

Gentlemen/Ladies:

This letter shall serve as Addendum No. 1 to the above RFP issued by the Orange County Transportation Authority (Authority). Offerors are reminded that the proposal submittal date is at or before **2:00 p.m., June 10, 2025**.

A pre-proposal conference is scheduled on-site/in-person and via teleconference on May 20, 2025 at 2:00 p.m. Offerors are advised that the location for the pre-proposal conference is updated as follows:

- 600 South Main Street, Orange, California, 92868
- Conference Room Number 09.

For prospective Offerors who wish to join via teleconference, please join or call-in using the following credentials:

- [Join the meeting now](#)
- OR Call-in Number: +1 916-550-9867
- Conference ID: 994 223 047#

The pre-proposal registration sheet is presented as Attachment A and the presentation is presented as Attachment B to this Addendum No. 1. Attendees are advised to complete the registration sheet (Attachment A) and email it to the undersigned at lmartinez1@octa.net no later than 5:00 p.m., May 20, 2025.

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

PRE-PROPOSAL/PRE-BID CONFERENCE REGISTRATION

RFP #: 5-3964

Date: May 20, 2025

Title: Claims Administration of the Self-Insured Workers' Compensation Program

1. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () _____ Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐ DBE ☐

E-Mail Address: _____

2. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () _____ Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐ DBE ☐

E-Mail Address: _____

3. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () _____ Registered on CAMM NET? ☐ Yes ☐ No

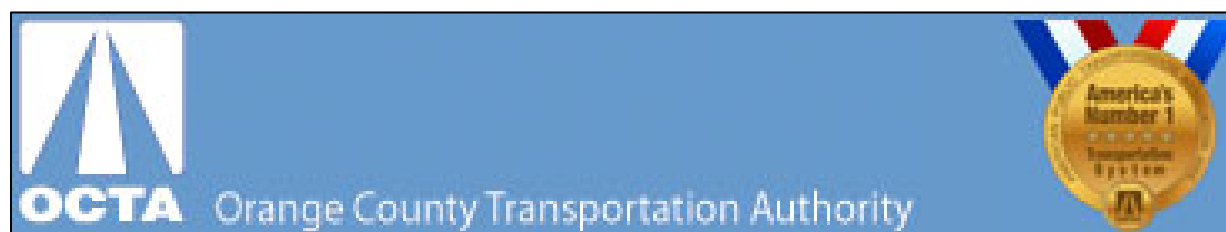
Prime ☐ Sub ☐ DBE ☐

E-Mail Address: _____

Pre-Proposal Conference

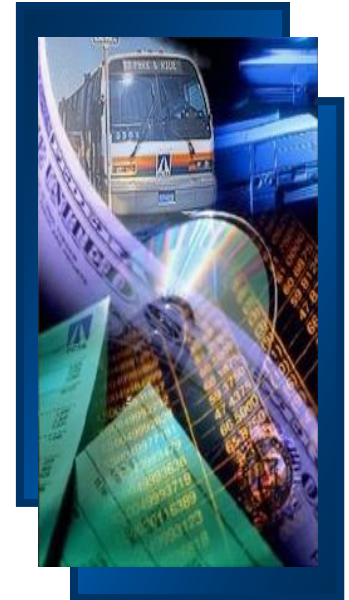
RFP 5-3964

Claims Administration of the Self-Insured Workers' Compensation Program



Agenda

- Introductions
- Safety/Emergency Evacuation
- Vendor Registration and Resources
- Online Business and Networking Tools
- Key Procurement Information & Dates
- RFP Documents Overview
- 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

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

Online Business & Networking Tools

ATTACHMENT B

CAMM NET Connect

- <https://www.facebook.com/CammnetConnect>

Working with Authority

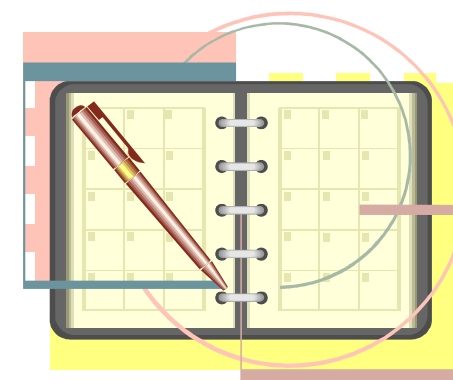
- <https://cammnet.octa.net/about-us/working/>

Planholder's List

- <https://cammnet.octa.net/procurements/planholders-list-selection/>

Key Procurement Dates

Written Questions Due:	May 22, 2025, 5:00 p.m.
Authority Responds:	May 27, 2025
Proposals Due:	June 10, 2025, 2:00 p.m.
Interviews:	July 2, 2025



Key Procurement Information

- All questions/contact with Authority staff should be directed to Luis Martinez, Senior Contract administrator
- Next Addendum will contain a copy of the Pre-Proposal sign-in sheet
- Award based on prime-sub relationship, not joint ventures
- ❖ Contract term: Five-Year Term

Guidelines for Written Questions

- Questions must be submitted directly to Luis Martinez, Senior Contract Administrator, in writing, by: **May 22, 2025, 5:00 p.m.**
- E-mail: lmartinez1@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., June 10, 2025
- 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
- Proposals and supplemental information received after the date and time specified above will be rejected

Proposal Submittal Instructions (continued)

- Authority has the right to:
 - accept or reject any and all proposals;
 - withdraw or cancel the RFP;
 - postpone proposal opening.
- Proposals received are considered public information
- Proposals are not to be copyrighted

Proposal Submittal Instructions (continued)

ATTACHMENT B

- Contract type is Firm-Fixed
- Conflict of interest
- Code of conduct

- Letter of Transmittal
- Technical Proposal
 - 1) Qualifications, related experience and references of Offeror
 - 2) Proposed staffing and project organization
 - 3) Work plan
 - 4) Exceptions / Deviations (Technical vs. Contractual)

Exhibits and Forms

- Exhibit A – Scope of Work (not submitted with proposal)
- ❖ Exhibit B – Price Summary Sheet
- Exhibit C – Proposed Agreement (not submitted with proposal)
- ❖ Exhibit D – Status of Past and Present Contracts
- ❖ Exhibit E – Campaign Contributions Disclosure
- Exhibit F – Level 1 Safety Specifications (not submitted with proposal)
- ❖ Exhibit G – Proposal Exceptions and/or Deviations

* Forms submitted with proposal are excluded from 50-page limit.

❖ These (Exhibits) Forms must be signed and submitted in your proposal.

❖ Exhibit B – “Price Summary Sheet”

- Offeror shall submit proposed pricing to provide services described in Exhibit A, Scope of Work.
- Offerors shall complete and sign the “Price Summary Sheet” form included with this RFP.
- Do NOT alter the Job Functions identified on the form.

Proposed Agreement

- Exhibit C – Proposed Agreement
- Please review the Proposed Agreement so you are aware of the contractual requirements of this project
 - Offerors are encouraged to review:
 - Article 3 - Scope of Work
 - Article 4 - Term of Agreement
 - Article 5 - Payment (Firm-Fixed)
 - Article 6 - Maximum Obligation
 - Article 9 - Insurance
 - Article 17 - Conflict of Interest
 - Article 18 - Code of Conduct
 - Any exceptions or deviations need to be detailed on Exhibit G



Evaluation and Award

- Proposals received, as instructed in the RFP, will be evaluated using the following evaluation criteria:
 - Qualifications of the firm 20%
 - Staffing and project organization 25%
 - Work plan 30%
 - Cost & Price 25%

Evaluation and Award (continued)

- “Short-Listed” firms will be invited to the interview
- Interviews are scheduled for **July 2, 2025**
- Offerors are requested to keep this date available

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

Scope of Work

Project Overview

Scope of Work Overview

- OCTA Highlights
- RFP Guidelines
- OCTA Claims Philosophy
- Claims Reporting
- Outside Claims Office Availability and Participation
- Claims Management Software

Questions?

- Reminder: today's discussions are non-binding



Reminders...

- Proposals are due @ **2:00 pm on June 10, 2025**
- Register on CAMM NET
- Leave a business card
- Please submit your pre-proposal sign-in sheets

Thank you for your interest in Orange County Transportation Authority!