



June 18, 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) 5-4074
“Rideshare Program Outreach Services”**

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., July 1, 2025**.

Offerors are advised of the following:

1. The Scope of Work and Price Summary Sheet have been revised, and the changes are highlighted in Attachment A, Exhibit A, Revised Scope of Work, and Attachment B, Exhibit B, Revised Price Summary Sheet, attached to this Addendum No. 1.
2. The following questions were submitted by the deadline:

Question 1:

Please clarify in the Scope of Work (SOW) if the selected bidder will be supporting two (2) or three (3) annual promotions. On pages 1 & 2 of the SOW, it refers to two (2) promotions (Bike Month and Rideshare Week). However, pages 3 & 4 of the RFP, refer to three (3) promotions – adding a reference to Dump the Pump.

Response 1:

The selected firm will be supporting two (2) annual promotions – Bike Month and Rideshare Week. Dump the Pump will not be a part of the promotions at this time.

Question 2:

On Page 3 of the SOW, under the section titled Target Markets, the 3rd bullet point states “Orange County employers with less than 100-249 employees interested in promoting ridesharing to their employees.” Did you mean employers with 100-249 employees?

Response 2:

Yes, that is correct, we are referring to employers with 100-249 employees in addition to larger employers with 250+ employees.

Question 3:

On pages 4 & 5 of the SOW, the RFP provides a detailed description of the **Project Manager and the Account Coordinator**. To coincide with these descriptions, the Price Summary Sheet (Exhibit B), lists three positions: Project Manager, Account Coordinator, and Account Manager. There is no write-up of the Account Manager position in the RFP SOW. As the incumbent contractor, the Account Coordinator position, as described in the SOW, is actually the description for the Account Manager position. Both our Project Manager and Account Manager are considered "Key Personnel" in our existing contract, and our three (3) Account Coordinators who work on the current contract, play a support role. Two thoughts: 1) can we consider the description of the Account Coordinator in the RFP SOW to be a more appropriate description for the Account Manager position?, and 2) might this impact OCTA's "**Evaluation Weights**" per job function as provided at the bottom of Page 1 of the "Price Summary Sheet" (Exhibit B)?

Response 3:

Refer to the attached Attachment A, Exhibit A, Revised Scope of Work and Attachment B, Exhibit B, Revised Price Summary Sheet.

Question 4:

Since the Authority has set a zero percent (0%) Disadvantaged Business Enterprise (DBE) participation for this project, and we (ITS) are not a DBE and do not plan to utilize a DBE, are we still required to complete and submit **Exhibits E-1 DBE Participation Commitment Form and E-2 DBE Letter of Acknowledgement and Commitment?**

Response 4:

Yes.

Question 5:

The previous OCTA Rideshare Program Outreach Services, RFP No. 3-2864, there was an additional Employer Program Metric that is not included in RFP No. 5-4074. That metric was the marketing and securing of additional employers to sign up for Metrolink's Corporate Pass Program (CPP). Just want to make sure this is not an oversight and that securing new employer CPP clients is not a part of this RFP.

Response 5:

OCTA is stepping back from promotion of Metrolink so OCTA won't be promoting it at this time.

Question 6:

Is there an incumbent for this contract and if so, how long has OCTA been working with them on this effort?

Response 6:

Yes, the current contract has been effective since February 26, 2024.

Question 7:

Since there is no DBE goal for this contract, are proposers still required to submit the DBE forms (Exhibit E-1, Exhibit E-2, and Exhibit E-3) if their proposal does not include DBE subcontractors?

Response 7:

See response to Question 4.

Offerors are reminded to acknowledge receipt of this Addendum No. 1 in their transmittal letter and Attachment B, Exhibit B, "Revised Price Summary Sheet, attached. 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 ehoskin@octa.net.

Sincerely,



Ellis Hoskin
Contract Administrator
Contracts Administration and Materials Management

**REVISED SCOPE OF WORK
OCTA RIDESHARE OUTREACH PROGRAM SERVICES**

INTRODUCTION

This Scope of Work describes Consultant's essential roles, responsibilities, functions, activities, and deliverables required for the successful ongoing outreach program for the Orange County Transportation Authority's (OCTA) Rideshare program.

OCTA was formed in June 1991 to address ongoing transportation needs in Orange County and create one agency to develop and implement transportation programs designed to reduce traffic congestion and improve air quality.

The goal of OCTA's Rideshare program is to provide Orange County commuters and employers with a variety of alternatives to driving alone and programs that they can choose from to meet their unique and constantly evolving needs. Consultant shall conduct outreach via calls and emails for OCTA's Rideshare program with the goals of increasing participation in employer programs and commuter rideshare modes. Consultant will act as an important extension of staff that is available to promote programs based on needs of the organization at the time as well.

Rideshare commuter options include carpooling, vanpooling, using bus and rail transit, bicycling, walking, and teleworking. Important OC Rideshare campaigns include two (2) annual promotions - May's Bike Month and October's Rideshare Week.

OCTA is seeking a firm that will develop an innovative approach to helping agency effectively reach and compel target audiences to take action in various ways that further rideshare program goals.

BACKGROUND

To further its mission, OCTA implements transportation control measures (TCM) to help achieve regional transportation plan emission reduction targets. Rideshare is an important component of this plan. The rideshare program provides a variety of support services for both employers and commuters with the goal of reducing drive alone trips where only a single passenger is riding in a personal vehicle. Rideshare programs also help employers in Orange County meet the requirements of the South Coast Air Quality Management District (South Coast AQMD) Rule 2202, which regulates employers in the county with 250 or more employees.

Employers regulated by this mandate must register with South Coast AQMD annually and have a plan in place to satisfy various requirements. Employers have one option that primarily requires paying a fee, but many implement a rideshare program to reduce employee trips to the worksite as an alternative. Employers who elect to have a rideshare program at their worksite must conduct an annual Average Vehicle Ridership (AVR) survey to achieve compliance and ridesharing activities are a very important aspect of this survey. The more ridesharing activity that occurs by company employees, the more likely their plan is to be approved and fees may potentially be decreased. OCTA provides complimentary survey assistance for these employers through a separate contract. The purpose of this Rule is to provide employers with a menu of options to reduce mobile source emissions generated from employee commutes, to comply with federal and state Clean Air Act requirements, Health & Safety Code Section 40458, and Section 182(d)(1)(B) of the federal Clean Air Act.

ADDENDUM NO. 1 TO RFP 5-4074
EXHIBIT A
ATTACHMENT A

Rideshare programs and services offered by OCTA include:

- **Vanpool formation services** through OCTA and contractor staff
- **The Perk Pass Program** which provides discounted bus passes to employees at participating employers (ten bus riders is the minimum needed to participate)
- **AVR survey calculation** and data analysis (provided by OCTA consultant at no cost to employers through a separate contract)
- **The Guaranteed Ride Home (GRH) program** which allows employees that rideshare the opportunity to have the cost of any emergency trip home reimbursed to act as a safety net for unpredictable circumstances arising
- **Employer and commuter outreach** by OCTA and consultant staff to aid in maximizing Orange County Rideshare program participation through email and phone calls
- **Employee Transportation Coordinators (ETC) marketing training** and network meetings
- **Ride matching and transit trip planning services** at www.go511.com or www.ridematch.info

Rideshare modes of transportation supported by OCTA include:

- **OC Bus** – utilizing OCTA's bus service to travel throughout the county
- **Metrolink Rail** – commuting on Metrolink's rail system which is promoted by OCTA
- **Vanpool** – groups of five (5) or more individuals who carpool to work in a leased vehicle (commuter has choice of one of three OCTA contractors) partially subsidized by OCTA
- **Carpool** – individuals who make the choice to travel with two or more individuals in their vehicle
- **Teleworking** – resources are provided to individuals who work from home instead of commuting to a centralized workplace or office
- **Walking** – pedestrian and active transportation programs are supported by OCTA
- **Biking** – biking is promoted and supported through various planning and marketing projects

OCTA's major annual rideshare campaigns include:

- **National Bike Month** - an annual campaign every May that focuses on biking as a viable alternative commuting option. This includes an ever-expanding diversity of events in communities nationwide (health regulations permitting), with the biggest feature of the month being Bike To Work Week. California's Bike to Work Week is typically the third week in May with a Bike to Work Day being promoted on the Thursday of that week in conjunction with the Bike Rally at OCTA.
- **Rideshare Week** - a nationally recognized event which takes place the first week of October to promote alternative commute modes to driving alone. Commuters throughout the region pledge to replace their solo drives with new, more sustainable commute choices such as carpool, vanpool, transit, bike, walk, telework, or compressed workweek. OCTA typically offers prize drawings for those who pledge to ride and pledges are the metric for success.

Other OCTA services that may be promoted on an as needed basis includes but is not limited to:

- **Bus Service Changes** – OCTA bus service is subject to change and outreach may be requested to promote the changes
- **Earth Day** – OCTA may need assistance promoting the annual event which takes place in April
- **Clean Air Day** – a campaign that may be promoted to coincide with California Clean Air Day in October if resources allow

PROGRAM MANAGEMENT

OCTA will designate an internal Project Manager to be the key contact for the Consultant and he or she will direct the Consultant's work effort. The OCTA Project Manager will provide project direction to guide the success of the project at every step. Consultant shall also designate their own Project Manager within the firm to be the primary liaison with OCTA for day-to-day marketing activities.

The selected Consultant will bill OCTA for services rendered on a monthly basis.

TARGET MARKETS

- Orange County employers with 250 or more employees currently utilizing OCTA services
- Orange County employers with 250 or more employees not currently utilizing OCTA services
- Orange County employees with less than 100-249 employees interested in promoting ridesharing to their employees
- Individuals who commute to workplaces in Orange County
- General Orange County public and residents

GOALS

Employer Program Metrics:

- Increase the number of AVR employer clients with a goal of reaching out to five (5) new employers monthly and securing ten (10) new employers annually
- Increase the number of employers participating in the vanpool program with a goal of reaching out to five (5) new employers monthly and contributing to the addition of two (2) new employers and five (5) new vanpools to the vanpool program annually
- Increase the number of Perk Pass employer clients and associated employees utilizing the program with a goal of reaching out to five new employers monthly and securing two (2) new employers annually

Commuter Metrics:

- Increase ridership in all Orange County alternate modes of transportation including bus, rail, vanpool and carpool
- Optimize commuter engagement in Bike Month, Dump the Pump and Rideshare Week through pledges and activity tracking
- Increase quantity of commuters utilizing OCTA Ridematch database
- Handle calls and emails for single riders looking to utilize ridesharing

Ongoing Education Goals:

- Educate employers about rideshare program details and relevant news
- Increase teleworking program awareness and best practices

- Strengthen awareness of OCTA programs and services among employers and commuters
- Promote OCTA news and updates to employers and employees

SCOPE OF SERVICES

▪ Planning

Analyze the employer market, existing sales plan, and other factors to create a monthly plan which will be used to direct outreach and sales efforts in conjunction with OCTA Project Manager. The plan shall include ongoing strategies for promoting employer programs and alternate commute modes in addition to targeted outreach around three annual Rideshare campaigns. While a general plan will be in place to guide the efforts of the Consultant, work is subject to change due to evolving OCTA priorities and input from Consultant. All work will be billed monthly in a time and expense format.

▪ Outreach

Conduct ongoing outreach effort throughout the year in the form of calls, meetings, personalized emails, customized presentations with employers and commuters along with in-person events for OCTA's Rideshare program with the goals of increasing participation in employer programs, commuter rideshare modes and annual rideshare campaigns. Effectively communicating in a concise, logical manner through all mediums will be vital to achieving optimal success. Consultant will be responsible for forming connections with relevant employers in their efforts to disseminate information as efficiently and effectively as possible.

▪ Sales

Maintain consistent contact with open leads and nurture them through the sales process to completion in an effective manner. While outreach will disseminate information, closing tactics will be necessary to enroll employers in appropriate programs. This may require customized presentations and follow-up that brings the lead to close. Due to the lengthy nature of the sales cycle for many OCTA programs, strategic follow-up, record keeping and nurturing will be important to success.

▪ Inbound Call Receiving

Answer and respond to commuter phone calls and voicemails pertaining to rideshare information. As part of its goal of increasing ridesharing in all forms, OCTA receives roughly 50-100 calls monthly from commuters looking to find ways to share the ride. Consultant will be responsible for fielding calls when available and responding in a timely manner to voicemails to assist commuters with carpool and vanpool matching.

Account Manager

The Account Manager will operate as the lead point of contact for building and maintaining a strong, long-lasting customer relationship as well as overseeing customer account management. Additionally, they will have primary responsibility for planning, scheduling, and resource allocation.

Account Coordinator

The Account Coordinator designated by Consultant will serve as the primary point of contact. This contact will be responsible for leading and managing the project and shall communicate and

coordinate in a timely manner all work and progress on the outreach program to the OCTA Project Manager.

The Account Coordinator must possess relevant experience, knowledge, and skills including experience communicating information to the general public in a manner that is clear, relevant, and memorable. Experience in proven effective communications and community outreach, including the ability to leverage multimedia platforms and technology to engage a wide range of stakeholders will also be important.

Key Personnel Changes

The Consultant's key personnel may be removed and replaced only with the written consent of the OCTA Project Manager for public outreach. Due to the importance of consistent project management for continuity, institutional knowledge, and to facilitate timely completion of the Project materials, OCTA will consider the unauthorized removal of the Consultant's key personnel as grounds for termination of the contract. OCTA reserves the right to require the Consultant to remove and replace the Consultant's key personnel or any member of the Consultant/sub-consultant team from the Project for cause.

Monthly Progress Reports

The monthly progress report provides an account of completed outreach activities performed the prior month and forecasted work. The monthly report will itemize work tasks. Important milestones should be included.

This report will be used to measure where program metrics are trending on an ongoing basis in relation to goals and how much progress has occurred. Adjustments may be made based on changing priorities. If progress towards goals is not occurring in the expected manner, changes in strategy will occur.

CONTRACT PERIOD

The contract period will be for five (5) years – September 1, 2025 to August 31, 2030.

Limitation on Governmental Decisions

Nothing contained in this scope of work permits Consultant's personnel to authorize or direct any actions, votes, appoint any person, obligate, or commit OCTA to any course of action or enter into any contractual agreement on behalf of OCTA. In addition, Consultant's personnel shall not provide information, an opinion, or a recommendation for the purpose of affecting a decision without significant intervening substantive review by OCTA personnel, counsel, and management.

REVISED PRICE SUMMARY SHEET

REQUEST FOR PROPOSALS (RFP) 5-4074

Enter below the proposed hourly rate(s) to perform work described in the Scope of Work, Exhibit A. Prices shall be fully-burdened rates to include hourly rate, general and administration, overhead and profit. The Authority's intention is to award a time-and-expense price contract.

**SCHEDULE I
HOURLY RATE SCHEDULE**

Effective for a five (5)-year term through August 31, 2030.

Key Personnel

Job Function	Name	Fully-Burdened Hourly Rate Effective- 8/31/26	Fully-Burdened Hourly Rate 9/1/26- 8/31/27	Fully-Burdened Hourly Rate 9/1/27- 8/31/28	Fully-Burdened Hourly Rate 9/1/28- 8/31/29	Fully-Burdened Hourly Rate 9/1/29- 8/31/30
Account Manager		\$	\$	\$	\$	\$
Account Coordinator		\$	\$	\$	\$	\$

FOR COST ANALYSIS PURPOSES:

Provide fully-burdened hourly rates for the above-designated job categories. The fully-burdened hourly rates will be included in the resulting agreement should your proposal be selected for award.

Each proposed hourly rate for the respective Job Function will be weighed according to the percentages specified in the "Evaluation Weight" column in the table below:

Job Function	Evaluation Weights
Account Manager	40%
Account Coordinator	60%

Note: For cost analysis purposes, please provide hourly rates for the above designated job categories

ADDENDUM NO. 1 TO RFP 5-4074

EXHIBIT B

ATTACHMENT B

Other Labor Charges

Job Function	Name	Fully-Burdened Hourly Rate Effective-8/31/26	Fully-Burdened Hourly Rate 9/1/26-8/31/27	Fully-Burdened Hourly Rate 9/1/27-8/31/28	Fully-Burdened Hourly Rate 9/1/28-8/31/29	Fully-Burdened Hourly Rate 9/1/29-8/31/30
		\$	\$	\$	\$	\$
		\$	\$	\$	\$	\$
		\$	\$	\$	\$	\$

**SCHEDULE II
OTHER DIRECT COSTS SCHEDULE**

	Type of ODC	Quantity	Unit Rate	Budget Amount
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
<p><i>ODC identified in table above and additional required and authorized by the Authority but not included in this Agreement will be reimbursed either (a) "At Cost" OR (b) up to the applicable Current Rate listed in this Schedule II, whichever is less.</i></p> <p><i>Mileage for travel shall be reimbursed at the current IRS mileage rates.</i></p> <p><i>Supporting documentation must accompany invoice.</i></p>				

***Please note the following:**

- The Authority will not reimburse Consultant for Hours charged to perform activities associated with the preparation and review of invoices submitted to the Authority.
- The Authority will not reimburse Consultant for local meals and travel time, unless previously approved, or any other expenses not included within this Exhibit B.

FIRM ACKNOWLEDGMENT:

The undersigned, upon acceptance, agrees to provide the service in accordance with the terms, conditions, and requirements as contained in RFP 5-4074 and the supporting documents for all prices proposed.

1. I acknowledge receipt of **RFP 5-4074** and Addenda No.(s) _____.
2. This offer shall remain firm for _____ days from the date of proposal.
(Minimum of 120)

COMPANY NAME

ADDRESS

TELEPHONE

FACSIMILE #

EMAIL ADDRESS

SIGNATURE OF PERSON
AUTHORIZED TO BIND OFFEROR

NAME AND TITLE OF PERSON
AUTHORIZED TO BIND OFFEROR

DATE SIGNED
