



June 4, 2025

NOTICE TO OFFERORS

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) 5-4109
“Property Management Services”**

This letter shall serve as Addendum No. 1 to the above RFP issued by the Orange County Transportation Authority (OCTA). This Addendum No. 1 is being issued to:

- A. Inform Offerors that a pre-proposal conference was held on June 3, 2025. The pre-proposal conference presentation is presented as Attachment A, and a copy of the pre-proposal conference registration is presented as Attachment B to this Addendum No. 1.
- B. Remind Offerors that all questions and clarifications requests are due no later than 4:00 p.m., on June 5, 2025.
- C. Remind Offerors that the proposal submittal date is at or before 2:00 p.m., June 24, 2025.

Offerors are reminded to acknowledge receipt of this Addendum No. 1 in their transmittal letters and Exhibit B, Price Summary Sheet. All changes addressed in this Addendum No. 1 shall be incorporated into the final Agreement.

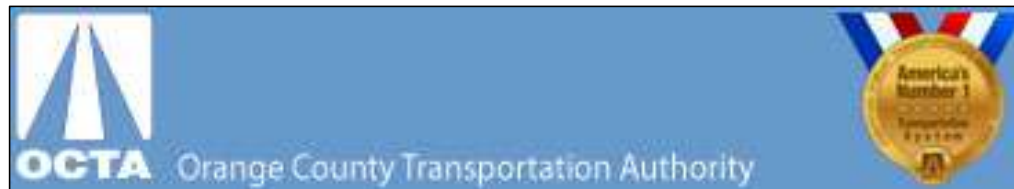
Questions regarding this Addendum No. 1 should be directed to the undersigned at mtouch@octa.net.

Sincerely,

Monique Touch

Monique Touch
Sr. Contracts Administrator
Contracts Administration and Materials Management

Pre-Proposal Conference for RFP 5-4109: Property Management Services



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/>

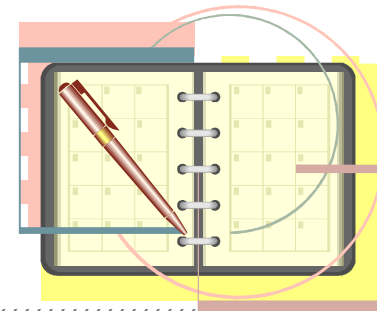
- To receive e-mail notifications of Solicitations, Addenda and Awards
- View and update your vendor profile
- Required for Award

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:	June 5, 2025
OCTA Responds:	June 9, 2025
Proposals Due:	June 24, 2025 by 2:00 PM
Interviews:	July 15, 2025
Board of Directors:	September 8, 2025



Key Procurement Information

- All questions/contact with Authority staff should be directed to the assigned Sr. Contract Administrator, Monique Touch
- 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
- Contract term is for an initial term of three (3) years, with an option for three (3) additional years

Guidelines for Written Questions


- Questions must be submitted directly to Monique Touch Sr. Contract Administrator, in writing, by: **Monday, June 9, 2025 at 4:00 p.m.**
- E-mail recommended: mtouch@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., May 20, 2024
- Proposals are to be submitted electronically using the secure link provided in the RFP: <https://RFP Upload>



User upload file

May 6, 2024 7:51 AM

Select RFP * Required

-- Available RFP Detail * --

Information display as: "RFP number" -- "Closing Date and Time" -- "Project Title"

Your Information * Required

First Name *	Last Name *
Email Address *	Phone Number *
Company Name *	Address *
City *	State *
Zip Code *	

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

Proposal Content (continued)

Forms:

- Exhibit D— Status of Past and Present Contracts
- Exhibit E- Campaign Contributions Disclosure Form
- Exhibit F – Level 1 Safety Specifications (not submitted with proposal)
- Exhibit G –Proposal Exceptions and/or Deviations

Note: Forms excluded from 50-page proposal limit.

Proposal Content (continued)

- Cost and Price Proposal – Exhibit B
 - Offeror shall submit proposed pricing to provide services described in Exhibit A, Scope of Work
 - The Offeror shall complete and sign the “ Price Summary Sheet” form included with this RFP (Exhibit B)

Evaluation and Award

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

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

- Evaluation Committee comprised of internal OCTA staff and external members

Evaluation and Award (continued)

- “Short-Listed” firms will be invited to interview
- Interviews are scheduled for **July 15, 2025**
- Offerors are requested to keep this date available

Award

- Award Process

- Evaluation Committee recommends highest ranking Offeror to the Finance and Administration (F&A) Committee
- F & A 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



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/Prohibitions
 - Article 18 - Code of Conduct



*Orange County Transportation
Authority*

Scope of Work

Sara Belovksy
PROJECT MANAGER

Project Overview and Scope of Work



Orange County Transportation Authority

- **BACKGROUND:** The Orange County Transportation Authority (OCTA) is seeking proposals from qualified property management firms to oversee the management and operations of its facilities located at 2677 North Main Street, Santa Ana, California and parking structure located at 2651 North Main Street, Santa Ana, California. The selected Contractor shall provide comprehensive property management services, ensuring efficient operations, tenant satisfaction, regulatory compliance, and cost-effective maintenance
- **RESPONSIBILITIES OF THE PROPERTY MANAGER**

- Questions?



- Reminder.... Proposals are due no later than 2:00 p.m. on June 24, 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 CONFERENCE REGISTRATION

RFP #: 5-4109

Date: June 3, 2025

Title: Property Management Services

1. Company Name: The Muller Company
Attendee: Jenny Blanchart and Suzi Mier
Address: 18881 Von Karmen Ave #400
City, State Zip: Irvine, CA 92682
Phone Number: (949) 460-5380 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐ DBE ☐
E-Mail Address: JBlanchart@mullerco.com

2. Company Name: Lincoln Property Company
Attendee: Heather Metoyer & Brett Weekley
Address: 2392 Morse Ave, Ste 100, Irvine CA 92614
City, State Zip: _____
Phone Number: (714) 401-9177 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐ DBE ☐
E-Mail Address: Hmetoyer@LPC.com

3. Company Name: _____

Lincoln

www.lpc.com

Heather Metoyer
Director of Property Management
License #01807188

C 714.401.9177
O 949.333.2125
hmetoyer@lpc.com

Lincoln Property Company
2392 Morse Avenue
Suite 100
Irvine, CA 92614

Brett Weekley
Regional Vice President
License #01927858

Office 714.689.1447
Cell 949.547.1439
bweekley@lpc.com
www.lpc.com

**LINCOLN
PROPERTY
COMPANY**

Lincoln Property Company
2392 Morse Avenue, Suite 100
Irvine, CA 92614



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 5-4109

Date: June 3, 2025

Title: Property Management Services

1. Company Name: Ryan Companies
Attendee: Cristina Fernbach
Address: 7755 Center Ave Ste 1100
City, State Zip: Huntington Beach, CA 92647
Phone Number: (480) 669-7067 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐ DBE ☐
E-Mail Address: Cristina.fernbach@ryancompanies.com

2. Company Name: Ryan Companies US, Inc.
Attendee: Oscar Cisneros
Address: 4275 Executive Square Suite 370
City, State Zip: La Jolla, CA 92037
Phone Number: (619) 382-0539 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐ DBE ☐
E-Mail Address: Oscar.cisneros@ryancompanies.com

3. Company Name: _____
Attendee: _____
Address: _____
City, State Zip: _____
Phone Number: (____) _____
Prime ☐ Sub ☐ DBE ☐
E-Mail Address: _____



Oscar Cisneros

Director of Management
oscar.cisneros@ryancompanies.com
p: 858-812-7906 c: 619-382-0539

Ryan Companies US, Inc.
4275 Executive Square, Suite 370, La Jolla, CA 92037
CA License 842487



☐ Yes ☐ No



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 5-4109

Date: June 3, 2025

Title: Property Management Services

1. Company Name: Total Commercial Real Estate Inc (TCRE)
Attendee: Michael Fiorina / Santiago Sciupac
Address: 2502 ARTESIA BLVD
City, State Zip: Redondo Beach, CA 90278
Phone Number: (213) 292 6677 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐ DBE ☐
E-Mail Address: SSciupac@tcrecorp.com
MFiorina@tcrecorp.com

2. Company Name:	
 Michael Fiorina CEO DRE #01901814 2502 Artesia Blvd. Redondo Beach, CA 90278 Tel 213-292-6677 mfiorina@tcrecorp.com www.tcrecorp.com	 Santiago Sciupac, CPM® COO DRE #01234248 2502 Artesia Blvd. Redondo Beach, CA 90278 Tel 213-292-6673 ssciupac@tcrecorp.com www.tcrecorp.com

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 REGISTRATION

RFP #: 5-4109

Date: June 3, 2025

Title: Property Management Services

1. Company Name: CBRE
Attendee: Jon Serber & Shayla Aguirre
Address: 18575 Jamboree
City, State Zip: Irvine, CA 92612
Phone Number: (949) 725-8500 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐ DBE ☐
E-Mail Address: jonathan.serber@cbre.com

2. Company Name: Jonathan Serber
Attendee: Jonathan Serber
Address: Senior Director
City, State Zip: Property Management
Phone Number: Lic. 01733789
Prime ☐ Sub ☐ DBE ☐
E-Mail Address: jonathan.serber@cbre.com

Jonathan Serber
Senior Director
Property Management
Lic. 01733789

CBRE

CBRE, Inc.
4400 MacArthur Blvd, Suite 350
Newport Beach, CA 92660
www.cbre.us

jonathan.serber@cbre.com
Main +1 949 955 2131
M +1 949 266 7521

MM NET? ☐ Yes ☐ No

3. Company Name: Paragon Partners
Attendee: Cheryl DeMucci
Address: _____
City, State Zip: _____
Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
Prime ☐ Sub ☐ DBE ☐
E-Mail Address: cdemucci@paragon-partners.com