NOTICE TO OFFERORS

June 28, 2016

SUBJECT: Request for Proposals (RFP) 6-1265, “On-Call Price Review and Buy America Review Services”

Gentlemen/Ladies:

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 18, 2016.

A pre-proposal conference was held at the Authority’s office in Orange on June 28, 2016. The pre-proposal registration sheet is presented as Attachment A and the pre-proposal presentation is included as Attachment B to this Addendum No. 1.

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 gmartinez@octa.net.

Sincerely,

Georgia Martinez
Senior Contract Administrator
Contracts Administration and Materials Management
| 1. | Company Name: MACIAS GINI + O'CONNELL LLP (MGO)  
Attendee: Linda Hurley  
Address: 4675 MACARTHUR CT SUITE 600  
City, State Zip: NEWPORT BEACH CA 92660  
Phone Number: 949 296 4340  
Registered on CAMM NET?: Yes  
E-Mail Address: LHURLEY@MGOCPA.COM |
|---|---|
| 2. | Company Name: Urban Engineers, Inc.  
Attendee: Andrew Royston  
Address: 515 S. Flower St., 36th Fl.  
City, State Zip: Los Angeles, CA 90071  
Phone Number: 213 797-2312  
Registered on CAMM NET?: No  
E-Mail Address: aroyston@urbaneengineers.com |
| 3. | Company Name: CONRAD LLP  
Attendee: Sam Perera  
Address: 23702 BURCHER DR  
City, State Zip: Lake Forest, CA 92630  
Phone Number: 949 552 7700  
Registered on CAMM NET?: No  
E-Mail Address: SPERERA@CONRADLLP.COM |
Attendee: 707 South Webster Avenue, Suite 113  
Address:  
City, State Zip: ANAHEIM, CA 92804  
Phone Number: 504 413-6337  
Registered on CAMM NET?: Yes  
E-Mail Address: LEWIS@COLEAC.COM |
PRE-BID / PRE-PROPOSAL REGISTRATION

ATTACHMENT A

RFP #: 6-1265  Date: June 28, 2016

Title: On-Call Price Review and Buy America Review Services

1. Company Name: **Conrad LLP**
   Attendee: **Liz Thomas**
   Address: **23702 Birtcher Dr.**
   City, State Zip: **Lake Forest, CA 92630**
   Phone Number: **(949) 552-7700**  Registered on CAMM NET? ☑ Yes ☐ No
   E-Mail Address: **ethomas@conradllp.com**

2. Company Name: 
   Attendee: 
   Address: 
   City, State Zip: 
   Phone Number: **( )**  Registered on CAMM NET? ☐ Yes ☐ No
   E-Mail Address: 

3. Company Name: 
   Attendee: 
   Address: 
   City, State Zip: 
   Phone Number: **( )**  Registered on CAMM NET? ☐ Yes ☐ No
   E-Mail Address: 

4. Company Name: 
   Attendee: 
   Address: 
   City, State Zip: 
   Phone Number: **( )**  Registered on CAMM NET? ☐ Yes ☐ No
   E-Mail Address: 

Revised: 03/02/2010

Page 1 of 1
PRE-BID / PRE-PROPOSAL REGISTRATION

ATTACHMENT A

RFP #: 6-1265      Date: June 28, 2016

Title: On-Call Price Review and Buy America Review Services

1. Company Name: Conrad LLP
   Attendee: Andrea Jeyasekara
   Address: 23702 Birkerie Dr
   City, State Zip: Lake Forest, CA 92630
   Phone Number: (949) 552 7100 x256
   Registered on CAMM NET? □ Yes □ No
   E-Mail Address: a.jeyasekara@conradllp.com

2. Company Name:
   Attendee:
   Address:
   City, State Zip:
   Phone Number: (    )
   Registered on CAMM NET? □ Yes □ No
   E-Mail Address:

3. Company Name:
   Attendee:
   Address:
   City, State Zip:
   Phone Number: (    )
   Registered on CAMM NET? □ Yes □ No
   E-Mail Address:

4. Company Name:
   Attendee:
   Address:
   City, State Zip:
   Phone Number: (    )
   Registered on CAMM NET? □ Yes □ No
   E-Mail Address:
Pre-Proposal Conference for RFP 6-1265: On-Call Price Review and Buy America Review Services
Agenda

• Introductions / Opening Statement
• Purpose of Pre-Proposal Conference
• Review of RFP Documents
• Review of the Scope of Work
• Questions and Answers
• Closing
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
OCTA’s Online Business Networking Tools

Camnet Connect

2 likes · 2 talking about this
How to access CAMM NET Connect:

• CAMM NET Facebook links

• Facebook links in CAMM NET Solicitation Emails
The Orange County Transportation Authority (Authority) invites sealed bids for construction of a railroad grade separation project at the railroad crossing...
The Orange County Transportation Authority (Authority) invites proposals from qualified Contractors for Tree Pruning Services to be performed at A...

Solicitation 2-1337: Tree Pruning and Maintenance Services
Close Date: 11/28/2012 4:00:06 PM
To connect with other firms interested in this procurement, comment below.

Like · Comment · Share

Jan Immanuel Zacat I am a sales representative for a major lawn equipment manufacturer. Please let me know if you are in the market for new equipment.
2 hours ago · Like

Carolina Boesch Coppola I provided tree pruning services. I am looking for a firm to partner with on this effort.
about an hour ago · Like

Write a comment...

The Orange County Transportation Authority (The Authority) invites qualified firms to provide on-site flu shot clinic services.

Business Opportunities
Solicitation 1-23087: On-Site Flu Shot Clinic Services
Close Date: 10/15/2012 4:00:06 PM
To connect with other firms interested in this procurement, comment below.

Like · Comment · Share

Jan Immanuel Zacat We are planning on proposing on this project and are very interested in subcontracting the demolition.
about an hour ago · Like

Carolina Boesch Coppola Jan - my firm provides demolition services. We are located in Laguna Hills and plan on attending the pre-proposal conference. Let me know if you will be there.
about an hour ago · Like

Write a comment...

My company is a small business who provides demolition services. We would love to partner with someone on this project.
18 hours ago · Like

Noah Johnson
CAMM NET’s Online Planholder’s List
– Vendors can also choose to receive update emails daily notifying them of any changes to the Planholder’s List Report.

– Companies can also search for open and closed solicitation Planholder’s List Reports to help them start the teaming process well in advance of the next posted solicitation.

– Learn more by going to: https://cammnet.octa.net/files/Planholders_List_Report_Guide.pdf
Key Procurement Dates

• Written Questions Due:       June 30, 2016
• OCTA Responds:              July 5, 2016
• Proposals Due:              July 13, 2016, 2:00 pm
• Interviews:                 July 26, 2016
Key Procurement Information

• Next Addendum will contain a copy of the Pre-Proposal sign-in sheet.
• Award based on prime-sub relationship, not joint ventures.
Guidelines for Written Questions

• Questions must be submitted directly to Georgia Martinez, Senior Contract Administrator, in writing, prior to established due dates.
• E-mail recommended: gmartinez@octa.net
• Any changes Authority makes to procurement documents will be by written Addenda only.
• Addenda will be issued via CAMM NET.
• Verbal discussions today are non-binding.
NEXT…
Proposal Instructions

Then…
Review of Scope of Work
Proposal Submittal Instructions

(Refer to RFP Section I, p. 4)

• Proposals are due by 2:00 p.m. on the date specified in the RFP.
• Proposals are to be submitted to the address specified in the RFP.
• Submit one (1) original and five (5) copies of proposal sealed and clearly identified on exterior of package as specified in the RFP.
• Submit one (1) electronic copy of the entire proposal in “PDF” format, on CD or DVD.
• Package clearly marked with the RFP number and title.
Proposal Submittal Instructions (continued)

(Refer to RFP Section I, p. 5)

- Authority has the right to:
  - accept or reject any and all proposals;
  - withdraw or cancel the RFP;
  - postpone proposal opening for its own convenience;
  - acceptance of proposal by Authority shall constitute a contract;
  - right to investigate the qualifications of any Offeror and/or require additional evidence of qualifications.

- Proposals received are considered public information.
- Proposals are not to be copyrighted.
• Contract type will be a CTO-based contract.
  • This RFP is issued to place several firms on an on-call list.
  • Several firms may be selected for a three-year initial term with one, two-year option term.
  • As the need for services arises during the term of the Agreement, CTO’s will be issued on a rotation basis to the on-call firms.

• Conflict of interest
• Code of Conduct
Proposal Content

(Refer to RFP Section II, p. 9-16)

• 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)
• 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 the “Price Summary Sheet” form included with this RFP (Exhibit B).
Proposal Content (continued)

(refer to RFP Section II, p. 14 and 15)

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

Note: Forms excluded from 50-page proposal limit.
Evaluation and Award

(Refer to RFP Section III, p. 17)

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

  - Qualifications of the firm: 35%
  - Staffing and project organization: 25%
  - Work plan: 15%
  - Fees: 25%
• “Short-Listed” firms will be invited to interview.

• Interviews are scheduled for July 26, 2016. Offerors are requested to keep these dates available.
Award

• Award Process

  • Evaluation Committee selects highest ranking Offeror(s) to Board Committee.
  
  • All firms submitting a proposal will be notified of Award via CAMM NET.
  
  • BOD may accept / reject staff’s recommendation.
  
  • All firms submitting a proposal will be notified of Award via CAMM NET.
Proposed Agreement

- Please review the Proposed Agreement so you are aware of the contractual requirements of these projects.

Exceptions

- Any exceptions must be identified on Exhibit G titled “Proposal Exceptions and/or Deviations” form.
Scope of Work
(Refer to Exhibit A)

Serena Ng
Project Manager

Project Overview and Scope of Work
Scope of Work

• Internal Audit seeks qualified firms to serve on an on-call basis to perform pre-award price reviews and Buy America reviews.
  • Internal Audit expects that there will be more need for the pre-award price reviews.

• All pre-award price reviews and Buy America reviews should be performed as agreed-upon procedures (AUP) engagements.
  • They should be conducted in accordance with Government Auditing Standards and relevant standards applicable to attestation engagements issued by the AICPA.
  • The firms should submit their most recent peer review report on the firm’s system of quality control.
• Price reviews may be requested of architectural and engineering (A&E) proposals, sole source proposals, and/or single bids. It is expected that contracted price reviews will typically involve A&E proposals.

• AUP procedures are detailed in the Scope of Work attachment and include:
  • Comparing proposed direct labor rates to payroll registers;
  • Reconciling indirect rate calculations to the consultant’s general ledger and reviewing calculations for unallowable costs under FAR; and
  • Comparing proposed escalation to the Employment Cost Index.
• Buy America reviews must be performed in accordance with the requirements of Title 49 CFR 663 “Pre-Award and Post-Delivery Audits of Rolling Stock Purchases.”
• The U.S. Department of Transportation handbook, “Conducting Pre-Award and Post-Delivery Audits for Bus Procurements” should be utilized.
• The AUP procedures are detailed in the Scope of Work attachment.
• Questions?
• Reminder…. Proposals are due @ 2:00 pm on July 13, 2016.

• Please leave a business card.

• Please register on CAMM NET.

• Thank you for your interest in OCTA! Feel free to stay and network.