



December 16, 2020

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SUBJECT: Request for Proposals (RFP) 0-2690 “Back Office System and Customer Service Center Operations Services for the 405 Express Lanes in Orange County”

Gentlemen/Ladies:

This letter and its Attachments comprise **Addendum No. 2** to the above captioned Request for Proposals issued by the Orange County Transportation Authority (herein after “Authority”).

1. Offerors are advised that a revised copy of the Pre-Proposal Conference PowerPoint Presentation included as Attachment B in Addendum No. 1 is included as Attachment A to this Addendum No. 2.

Offerors are reminded to acknowledge receipt of this **Addendum No. 2** in their Letter of Transmittal, which is to accompany the proposal. Offerors are advised that all changes addressed in this **Addendum No. 2** shall be incorporated into the final Agreement.

Questions regarding this **Addendum No. 2** should be directed to the undersigned at 714-560-5743.

Sincerely,

Bob Webb

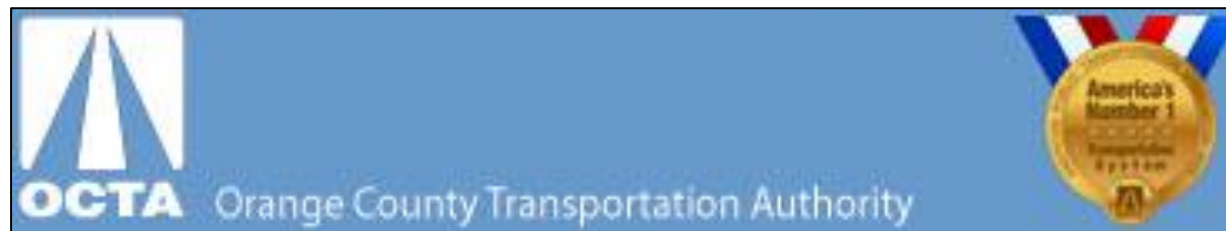
Bob Webb
Principal Contracts Administrator
Contracts Administration and Materials Management

Attachment

- Attachment A: Pre-Proposal Conference PowerPoint Presentation (Revised)

Pre-Proposal Conference for

RFP 0-2690 BOS and CSC Operations for the 405 Express Lanes in Orange County December 17, 2020



Agenda

- Introductions / opening Statement
- Purpose of Pre-proposal Conference
- Review of RFP Documents and Key Dates
- Disadvantaged Business Enterprise (DBE) Requirements
- Review of Scope of Work and Requirements
- Questions and Answers
- Closing

Doing Business with OCTA

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

Bob Webb

**Principal Contract Administrator
OCTA Contracts Administration and Materials
Management**

405ELBOS-CSC@octa.net

(714) 560-5743

CAMM NET Registration

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

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

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- 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/>
- Disadvantaged Business Enterprise (DBE) Program
 - <https://cammnet.octa.net/dbe/>

Procurement Timeline

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

Written Questions Due.....See RFP for Multiple Dates
OCTA Responds.....See RFP for Multiple Dates
Proposals Due March 22, 2021
InterviewsMay 19 & 20, 2021
OCTA Board Approval of Contract AwardJuly 26, 2021

Questions must be submitted to:
405ELBOS-CSC@octa.net

Key Procurement Information

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- Next addendum will contain a copy of the Pre-Proposal conference's PowerPoint presentation and sign-in sheets.
- Contract award will be based on prime-sub relationships, not joint ventures.
- A single contract will be awarded.

Guidelines for Questions

- Questions, comments and requests for clarifications related to procurement documents must be submitted in writing to this email address: 405ELBOS-CSC@octa.net
- Other questions may be submitted directly to Bob Webb, Principal Contract Administrator at rwebb@octa.net
- All questions must be submitted in writing prior to established due dates.
- Verbal discussions today are considered non-binding.

Addenda

- Questions received and Authority's responses will be entered into a cumulative log and posted on CAMM NET.
- Any changes Authority makes to procurement documents will be by written Addenda only.
- All addenda will be issued via CAMM NET.

- Funding for the Work on the 405 Express Lanes is funded by a combination of funds, including Transportation Infrastructure Finance and Innovation Act (TIFIA) funds. As such all federal requirements apply to this project.

Proposal Submittal Instructions

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- Proposals are due by **2:00 p.m.** on March 22, 2021.
- Proposals are to be submitted to the address specified in the RFP.
- Submit **one (1) original, eight (8) hard copies of Technical Proposal;** and one (1) electronic copy (on a flash drives).
- Submit **one (1) original, one (1) hard copy of Price Proposal;** and one (1) electronic copy (on a flash drive).

Proposal Submittal Instructions (continued)

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- Authority has the right to:
 - accept or reject any and all proposals;
 - withdraw or cancel the RFP;
 - postpone proposal opening for its own convenience; and
 - approve/disapprove Offeror's key personnel or changes in an Offeror's organization.
- Proposals received are considered public information.
- Proposals are not to be copyrighted.

Proposal Submittal Instructions (continued)

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- Contract type is firm fixed and variable price contract.
- Conflict of interest
- Prohibition
- Prime and lower tier debarment
- Liquidated damages
- Public records and information

Proposal Content

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ADDENDUM NO. 2, ATTACHMENT A

- Letter of Transmittal
- Executive Summary
- Technical Proposal
 - a) Qualifications, related experience and references of Offeror
 - b) Staffing and project organization
 - c) Implementation Work Plan and Technical Approach to BOS
 - d) CSC Operation Work Plan, Transition and Approach
- Exceptions / Deviations (Technical and/or Contractual)
- Required Appendices
- Required Forms

Proposal Content (continued)

- Cost and Price Proposal – Exhibit D

To be completed and submitted in a sealed and marked envelope, separate from the main Proposal.

- Forms

- Forms A through Q, with the exception of Form K, must be filled out and submitted with the Proposal.
- Review bonding requirements for the projects.

Note: Forms are excluded from the 100-page proposal limit.

Proposal Content (continued)

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ADDENDUM NO. 2, ATTACHMENT A

- Forms (continued)

- Status of Past and Present Contract Form

Offeror shall identify the status of past and present contracts where the firm has either provided services as a prime vendor or a subcontractor during the past five (5) years in which the contract has been the subject of or may be involved in litigation with the contracting authority. This includes, but is not limited to, claims, settlement agreements, arbitrations, administrative proceedings, and investigations arising out of the contract. **Failure to disclose may result in a finding of non-responsiveness.**

IF IN DOUBT, DIVULGE

Proposal Content (continued)

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- Forms (continued)

- Proposal Exceptions and/or Deviations Form

Offeror shall specifically and in detail identify the exception and/or deviation and the rationale for requesting the change. Vague or overly broad exceptions and/or deviations will not be reviewed nor considered by the Authority. Each exception and/or deviation should be noted on the form individually.

Proposal Evaluation and Award

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- Proposals, timely received, will be evaluated using the following BOD-approved evaluation criteria:

Qualifications , Related Experience	15%
Staffing and Project Organization	15%
Implementation Work plan & Technical Approach	30%
CSC Operations Work Plan, Transition & Approach	20%
Cost and Price	20%

- Evaluation Committee comprised of staff from OCTA and other agencies.

Evaluation and Award (continued)

- Short-Listed” firms will be invited to interview.
- Interviews are scheduled for May 19 & 20, 2021.
- Offerors are requested to keep these dates available in their calendars.

Evaluation and Award (continued)

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- Award Process

- Evaluation Committee recommends highest ranking Offeror to the Board Committee.
- Board Committee makes recommendation to Authority's Board of Directors.
- Authority Board may accept / reject staff's recommendation.
- All firms submitting a proposal will be notified of Contract Award via CAMM NET.



Proposed Agreement

- Proposed Agreement
 - Please review the Proposed Agreement so you are aware of the contractual requirements of the Project, including: term of Agreement; schedule and completion dates; insurance; bonds; intellectual property; liquidated damages; and others.
- Exceptions
 - Any exceptions must be identified in the Exception / Deviation section of your proposal, using Form F.

DBE Requirements and Forms Overview

RFP 0-2690 BOS and CSC Operations for the 405 Express Lanes in Orange County

Conditions of Responsiveness

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- The Authority is utilizing Federal funds toward this project and is required to implement the DOT Disadvantaged Business Enterprise (DBE) Program Plan, based on U.S. DOT, 49 CFR, Part 26 requirements.

Demonstration of Responsiveness

In order to demonstrate responsiveness, Proposers must:

Meet the 3% DBE contract-specific goal by proposing sufficient DBE participation (with certified **DBE** firms)

OR

Demonstrate good faith efforts were undertaken to achieve the DBE goal.

Conditions of Responsiveness

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ADDENDUM NO. 2, ATTACHMENT A

The following conditions must be met for responsiveness:

- Timely submission of “Exhibit 10-O1 Consultant Proposal DBE Commitment” form (Form D-1). This form should identify all DBE firms proposed to participate in the project regardless of tier.
- Timely submission of “DBE Letter of Acknowledgement and Commitment” from each proposed DBE, completed in its entirety and signed.

DBE Required Forms Checklist

REQUIRED	FORM NAME	<u>DUE DATE</u>	CONFIRM BEFORE SUBMITTING
YES	Exhibit 10-O1 Consultant Proposal DBE Commitment (Form D-1)	Required to be submitted with proposal, on proposal due date	<ul style="list-style-type: none"> Are all firms DBE certified through CUCP? Are NAICS/WCC codes applicable to proposed scopes? Are my totals and listed percentages correctly calculated?
YES	DBE Letter of Acknowledgement and Commitment	Required to be submitted with proposal, on proposal due date	<ul style="list-style-type: none"> Have I submitted a DBE Letter of Acknowledgement for each proposed DBE on the “Exhibit 10-O1 Consultant Proposal DBE Commitment” form (Form D-1)? Is it signed? Does it match the “Exhibit 10-O1 Consultant Proposal DBE Commitment” form (Form D-1)?
If DBE goal not met.	DBE Information – Good Faith Efforts	Required no later than 4:00 p.m. on the 2 nd business day after the proposal due date	<ul style="list-style-type: none"> Have I reviewed all examples provided in this power point? Have I reviewed the GFE Toolkit on OCTA’s website? Have all statements and efforts been documented?
YES	Bidders List	Required no later than 4:00 p.m. on the 2 nd business day after the proposal due date	<ul style="list-style-type: none"> Does it include all firms who submitted a bid/quote/proposal, DBE and not DBE? Are any DBE firms listed who I have not proposed to utilize or did not list in item C of my good faith efforts?

If an “Exhibit 10-O1 Consultant Proposal DBE Commitment” form (Form D-1) and DBE Letter of Acknowledgement and Commitment is not submitted with the proposal, you will be found non-responsive.

“Exhibit 10-O1 Consultant Proposal DBE Commitment” Form (Form D-1)

RFP 0-2690
Form D-1 Exhibit 10-O1
Consultant Proposal DBE Commitment

[Reset Form](#)

EXHIBIT 10-O1 CONSULTANT PROPOSAL DBE COMMITMENT

1. Local Agency: 2. Contract DBE Goal:

3. Project Description:

4. Project Location:

5. Consultant's Name: 6. Prime Certified DBE: ☐

7. Description of Work, Service, or Materials Supplied	8. DBE Certification Number	9. DBE Contact Information	10. DBE %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Local Agency to Complete this Section	11. TOTAL CLAIMED DBE PARTICIPATION
17. Local Agency Contract Number: <input type="text"/> 18. Federal-Aid Project Number: <input type="text"/> 19. Proposed Contract Execution Date: <input type="text"/> 20. Consultant's Ranking after Evaluation: <input type="text"/> Local Agency certifies that all DBE certifications are valid and information on this form is complete and accurate. <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> % <small>IMPORTANT: Identify all DBE firms being claimed for credit, regardless of tier. Written confirmation of each listed DBE is required.</small> 12. Preparer's Signature <input type="text"/> 13. Date <input type="text"/> 14. Preparer's Name <input type="text"/> 15. Phone <input type="text"/> 16. Preparer's Title <input type="text"/>

DISTRIBUTION: Original – Included with consultant's proposal to local agency.

ADA Notice: For individuals with sensory disabilities, this document is available in alternate formats. For information call (916) 654-6410 or TDD (916) 654-3880 or write Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.

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January 2019

Conditions of Responsiveness (Cont)


- **At time of proposal submission**, DBEs must possess a valid DBE Certification from the California Unified Certification Program (CUCP) (<https://dot.ca.gov/programs/civil-rights/dbe-search>).
- A firm's participation is only eligible to count towards DBE credit in the work code category (WCC) or the North American Industry Classification System (NAICS) codes contained within their CUCP DBE Profile:

DBE NAICS	541611; 541620; 541910;
ACDBE NAICS	
Work Codes	C8713 CONSULTANT, ENVIRONMENTAL; I8750 Market Research & FOCUS Groups; C8700 CONSULTANT, NON ENGINEERING;
Licenses	
Trucks	
Gender	F
Ethnicity	HISPANIC
Firm Type	DBE

- Services subcontracted by DBE firms to non-DBE firms may not be credited towards DBE participation.

“DBE Letter of Acknowledgement and Commitment”

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A



RFP X-XXXX
EXHIBIT E-X

DBE LETTER OF ACKNOWLEDGMENT AND COMMITMENT

1. RFP NO.: _____

2. Project Name/Description: _____

3. Offeror: _____

4. DBE Commitment Information

(A) Description of work to be performed by DBE firm (include bid item number on the DBE Participation Commitment Form as applicable):

(B) Percentage of work to be performed _____ (For Architectural & Engineering Services Proposals)

OR

Dollar value of work to be performed \$ _____ (For Professional Services Proposals)

5. DBE ACKNOWLEDGMENT*

I acknowledge that my firm has been listed by the Offeror named above, and is committed, to perform the scope and portion of work (A and B) stated above.

DBE Firm's Name: _____

Name: _____

Signature: _____

Title: _____

Telephone: _____

*If the offeror does not receive award of the prime contract, any and all representations in this letter of Acknowledgment and Commitment shall be null and void.

This form may be used to fulfill the DBE Participation Commitment Letter requirement as stated in the RFP instructing that the "the offeror is required to submit with the proposal a DBE Letter of Acknowledgement and Commitment signed and dated from each DBE acknowledging that the DBE is participating in the contract for the specified value and scope of work."

- This Form must be submitted for each DBE firm proposed and listed on the “Exhibit 10-O1 Consultant Proposal DBE Commitment” form (Form D-1)
- Form must be signed by each DBE firm
- Value listed must match the “Total” value of proposed participation listed on the “Exhibit 10-O1 Consultant Proposal DBE Commitment” form (Form D-1)
- Form must be submitted with the proposal

Good Faith Efforts (GFE) Requirements

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- Proposer must demonstrate REAL and SUBSTANTIVE Efforts
- Proposer must have undertaken all necessary and reasonable steps to achieve the DBE goal that by their scope, intensity, and appropriateness to the objective of meeting the goal could reasonably be expected to obtain sufficient DBE Participation.
- Authority will consider the quality, quantity, and intensity of the different kinds of efforts undertaken by Proposer.
- Authority will examine GFE made by other Proposers, for the same solicitation, for comparison.
- A GFE Toolkit is available on CAMMNET for additional guidance.
<https://cammnet.octa.net/dbe/files/GFE%20Toolkit.pdf>

Requirements for Good Faith Efforts (GFE) When Goal Not Met

(refer to the DBE Information-Good Faith Efforts form in the RFP)

A. Items of Work the Proposer Made Available to DBE Firms;

The percentage of work made available should exceed the DBE contract goal

- The scopes of work made available should match what was listed on the proposer's Request for Proposal, Ad and solicitation e-mails
- Proposer should unbundle larger scope items to facilitate DBE participation.

Requirements for Good Faith Efforts (GFE) When Goal Not Met

B. Solicitation Effort Documentation;

- A reasonable amount of DBEs must be solicited from the available firms per scope area (NAICS/WCC) made available. If OCTA's DBE Listing includes 300 DBE firms in a NAICS or WCC category, contacting 50 firms would not demonstrate an adequate good faith effort in this GFE area.
- If Proposer prepares a summary sheet of written solicitations that occurred, evidence of the individual solicitations should be submitted with the summary sheet. A summary sheet and a template of the solicitation language does not demonstrate adequate GFE unless the individual solicitations are also submitted.
- Call logs must include type date, time and who was spoken to and results of the communication(e.g. interested, proposing, not proposing).

Requirements for Good Faith Efforts (GFE) When Goal Not Met

B. Solicitation Effort Documentation (continued);

- Proposer's should solicit firms at a minimum no later than 14 calendar days prior to the Authority's proposal due date and follow up to the solicitations should allow DBE firms reasonable time to respond.
- If a firm was contacted and identified to be interested or if no response was yet received, call-log or e-mail documentation must be included to show a timely follow-up was made.
- Proposer must include within their GFE documentation efforts to identify correct numbers or e-mails if numbers were out of service or e-mails were returned.
- DBE firms solicited must be advised if the original proposal due date has been extended.

Requirements for Good Faith Efforts (GFE) When Goal Not Met

c. Rejected DBE Proposal Documentation;

- Proposer MUST include quote(s) from rejected DBE firm(s), the quote from the firm selected for the work AND an explanation of why the selected firm was chosen over the rejected DBE.
- If the reason for rejection was “price” the quotes must be “like” in comparison? If the DBE was offered proposal items 1-5 and Non-DBE firm was offered proposal items 1-20, they may have an ability to offer a lower rate for items 1-5 as they can absorb the cost in other areas. These are not “like” quotes.
- If the reason for rejection was “price“, the cost differential should be greater than 10%? If not, it would be reasonable to conclude the proposer should have given cognizance to the goal and opted to go with the DBE.
- Proposer to provide efforts made (and documented) to communicate, clarify and/or bring rejected DBE firms on the team.

Requirements for Good Faith Efforts (GFE) When Goal Not Met

D. Publication Efforts Made to Advertise the Projects to Solicit DBE Participation;

- To demonstrate responsiveness in this area, proposer must not place publications on a media that requires a fee to view.
- Publications must be posted a minimum of 14 calendar days before the proposal due date.
- Publications must include information about the contract (location of project, contract number, proposal due date, scope of work made available and contact information.)
- If the proposal due date is extended, publication should be re-run to notify potential proposers are also notified.

Requirements for Good Faith Efforts (GFE) When Goal Not Met

E. Agencies, Organizations, or Groups Contacted to Provide Assistance in Contracting, Recruiting, and Using DBEs;

- Proposer must reach out to local Agencies, Chambers or Minority Associations and submit documentation of these efforts.
- If assistance was provided by an agency, organization and/or group, the proposer must show they have utilized or followed-up with the assistance provided.

Examples:

District 12, District Local Assistance Engineer: Tifini Tran at (949) 756-7805 or at Tifini.Tran@dot.ca.gov

District Small Business Liaisons (DSBL): Brian G. Walsh, DSBL #12 (949) 724-2332, Brian.G.Walsh@dot.ca.gov.

California Construction Contracting Program (CCCP): Peg Bergmann, Project Director, at (916) 445-3512 or at peg_bergmann@dot.ca.gov.

SCORE Orange County

List of California Chambers by County: <http://advocacy.calchamber.com/resources/local-chambers/>

Construction Management Association of America (So Cal Chapter): www.cmaasc.org

Requirements for Good Faith Efforts (GFE) When Goal Not Met

F. Efforts to Provide Information About the Plans, Specifications, and Contract Requirements;

- Assistance should be documented in the publication and Proposer's Requests For Proposal.
- Proposer to provide e-mails or faxes to document assistance was provided.
- Efforts should exclude supplies and equipment the DBE subconsultant purchases or leases from the prime consultant or its affiliate(s).

G. Assistance with Lines of Credit, Insurance, and/or other Services;

- Assistance should be documented in the publication and Proposer's Requests For Proposal.
- Proposer to provide e-mails or faxes to document assistance was provided.
- Proposer to submit documentation of innovative measures to assist DBEs with bonding, lines of credit or insurance.
- Proposer should provide a link to the plans and specifications in their solicitation or document how plans and specifications were made available to prospective proposers by some other means.

Requirements for Good Faith Efforts (GFE) When Goal Not Met

H. Additional Data to Support a Demonstration of Good Faith Efforts;

- Any additional good faith efforts demonstrated that do not fall into categories A through G.
- The DBE participation commitment of the other proposers is the primary consideration for this category. The Authority will determine what the average commitment of the proposers is and if this proposer met that average. If the proposer did not meet the average, it can be reasonably assumed that their good faith efforts were not sufficient in this area.

Example:

- 1st proposer: 3% commitment
- 2nd proposer : 6% commitment
- 3rd proposer : 10% commitment

In the above scenario the average of the proposers is 6.3%, as the 1st proposer came in below the average, they did not sufficiently demonstrate good faith efforts in relation to the other proposer.

Bidders List

(refer to the Bidders List in the RFP)

- Proposer is required to complete and submit the DBE Form D-3 form (titled Bidders List) to Authority no later than 4:00 p.m. on the 2nd business day after the proposal due date
- Bidders List is to include all firms (DBE and non-DBE) that submitted quotes or proposals to act as subconsultants, suppliers or brokers, whether or not you elected to use them in your proposal.

I-405 Express Lanes Overview

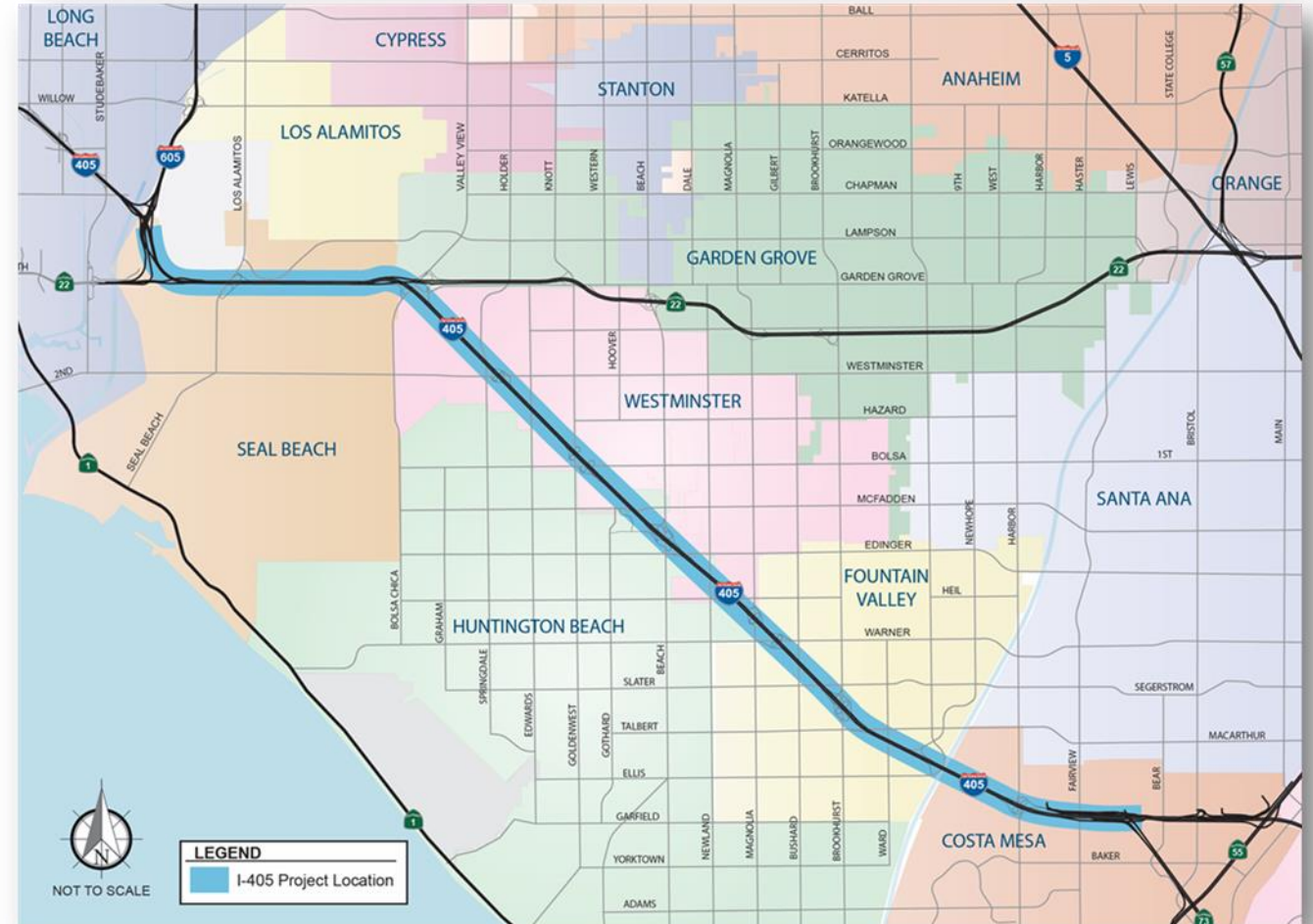
RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

Kirk Avila
OCTA Express Lanes General Manager

I-405 Procurement Background

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- New Express Lanes between State Route 73 (SR-73) and Interstate 605 (I-605)
- Anticipated to go live in October 2023
- Kapsch USA is the lane systems provider



Systems and Services to be Procured

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

Dan Baker
Program Management Consultant Team

High-Level Scope of Work

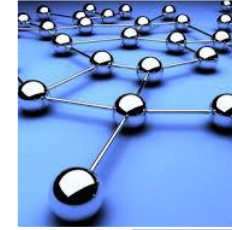
RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A



- Customer Service and Operations Staffing (No TOC staffing)
- Financial Reconciliation
- Customer contact channels
- Self-Service capabilities
- Call Center/IVR
- Initial collections
- Staff Performance Management
- Customer Satisfaction Measurement



- Account Management
- Trip Processing
- Violation Processing
- Payment Processing
- Financial Processing
- Back Office Operations
- Inventory Management
- BOS Performance Management



- Collections (two)
- Merchant Services Provider (two)
- Registered Owner Lookup
- CTOC/Interoperability
- Mail House (optional)
- Lockbox (optional)
- Rental and Fleet

Items of Note

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- Fully formed and priced trips from the lane to the BOS
- Image processing/review by Kapsch as part of trip building
- No traffic operations center, traffic detection, sign control or ITS included in this procurement



Items of Note (cont.)

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- OCTA is providing CSC Operations space along the I-405 corridor
- Upon selection, the contractor will immediately begin coordination with the OCTA-provided facility design firm
- OCTA build-out of CSC in 2022
- Other contractors will likely be co-located at the facility
- BOS must be hosted elsewhere at a Tier III data center and/or in the cloud



- There is a second NTP for “Commencement of Ramp Up/Customer Services”
- Serves as notification to the Contractor that the lanes are anticipated to open in ≈ 120 days
- 30 days after, the contractor must provide the capability for customers to setup accounts, order transponders, have gained approval of plans and be on schedule



- Mobile application (optional)
- Data warehouse (optional)
- Analytics (optional)
- Collection agencies direct access



Price Proposal

RFP 0-2690
ADDENDUM NO. 2, ATTACHMENT A

- Pricing primarily based on Trips, Accounts and Violations
- Some costs are netted out of revenue (collections and credit card fees)
- Some per item costs (for example, mail handling/printing and ROV lookups)
- Some pre-loaded pass-throughs (for example, postage)
- “Future Functionality” should not affect price
- “Including but not limited to:” intent



Questions and Answers

***If you have specific questions
regarding this procurement,
please contact Authority's
Contract Administrator.***