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December 22, 2009

**SUBJECT: REQUEST FOR PROPOSALS (RFP): 9-0915
EMPLOYEE SERVICE AWARD PROGRAM**

Gentlemen/Ladies:

The Orange County Transportation Authority invites proposals from qualified consultants to provide Service Award Related Services.

Please submit your proposal (one original and two copies) to the attention of Donald Herrera. Proposals must be submitted at or before **11:00 a.m., January 26, 2010**. Your proposal must include demo catalogs and Exhibit B, "Price Summary Sheet."

Proposals received after the date and time specified above will not be accepted.

All Offerors interested in doing business with the Authority are required to register their business on-line at CAMM Net, the Authority's interactive website. The website can be found at www.octa.net/cammnet.

Proposals shall be submitted in one of the following manners:

1. Email:

**Orange County Transportation Authority
Contracts Administration and Materials Management
Attention: Donald Herrera, Buyer RFP 9-0915
Email Address: dherrera@octa.net**

2. US Mail/ In Person/Courier Delivery:

**Orange County Transportation Authority
Contracts Administration and Materials Management
600 South Main Street, 4th Floor
Orange, CA 92868
Attention: Donald Herrera, Buyer RFP 9-0915**



Offerors are requested to provide a statement to the effect that the proposal shall remain valid for a period of not less than 120 days from the date of submittal.

The Authority will evaluate the proposals received and shall select for award the proposal which provides the **most value to the Authority**. The Authority may also negotiate contract terms with the selected Offeror prior to award, and expressly reserves the right to negotiate with several Offerors simultaneously and, thereafter, to award a contract to the Offeror offering the most favorable terms to the Authority.

The Authority reserves the right to award its total requirements to one Offeror or no Offeror as the Authority may deem to be in its best interest. In addition, negotiations may or may not be conducted with Offeror; therefore, the proposal submitted should contain Offeror's most favorable terms and conditions, since the selection and award may be made without discussion with any Offeror.

Clarifications, questions, or comments shall be submitted in writing no later than **5:00 p.m., January 6, 2010**. Submit all clarifications, questions, or comments to dherrera@octa.net. On the subject line of e-mail, please reference as follows: Written Questions, RFP 9-0915.

Responses to Questions received before the submittal time will be communicated via an addendum, which will be posted on CAMM Net, no later than January 12, 2010.

The successful Offeror will be required to comply with all applicable Equal Employment Opportunity Laws and Regulations.

The budget allocated for this service is \$30,000.00.

Sincerely,


Donald Herrera

Buyer

Contracts Administration and Materials Management

Enclosures: Exhibit A – Scope of Work,
Exhibit B – Price Summary Sheet



SCOPE OF WORK

Employee Service Award Program

BACKGROUND

The Orange County Transportation Authority has a Service Award Program in place that honors employees at five year increments from five years to 30 years. This program honors Coach Operators, Maintenance employees and Administrative employees.

Currently all employees receiving a service award are invited to an onsite luncheon with the Chief Executive Officer (CEO) and Executive Directors. At the luncheon, employees receive a letter signed by the CEO and a pin with the Authority's logo. The pin includes a stone that denotes the number of years of service.

5 years	simulated ruby	1/10 10K gold filled pin
10 years	simulated emerald	10K gold, 1.7 dwt
15 years	one diamond	14K gold, 1.9 dwt
20 years	two diamonds	14K gold, 1.9 dwt
25 years	three diamonds	14K gold, 1.9 dwt
30 years	four diamonds	14K gold, 1.9 dwt

The Authority has approximately 2,000 employees with 1,200 Coach Operators, 300 Mechanics and 500 Administrative employees.

PROJECT DESCRIPTION

The Authority would like to change the service award program from the letter and pin awards to a catalog based program with more award choices.

The estimated number of service awards for the 2010 calendar year:

1 Year of Service	Certificate & Authority Enamel Pin	52 Employees
3 Years of Service	Certificate & Authority Enamel Pen	143 Employees
5 Years of Service	Certificate & 5 year pin w/simulated ruby	111 Employees

The five year award will include a certificate and simulated ruby pin. After 10 years of service employees would be eligible for the catalog gift program designated below:

10 Years of Service	Certificate & Catalog Gift	81 Employees
15 Years of Service	Certificate & Catalog Gift	14 Employees
20 Years of Service	Certificate & Catalog Gift	47 Employees
25 Years of Service	Certificate & Catalog Gift	21 Employees
30 Years of Service	Certificate & Catalog Gift	29 Employees
35 Years of Service	Certificate & Catalog Gift	13 Employees

The catalog shall be designed and produced by the consultant with phrasing on certificates to be determined by the consultant and approved by the Authority's Employee Programs Administrator. The catalog shall depict photos of the gift items for selection by employees.

The catalog shall include a pre-paid card which enables eligible employees to select and order a gift from the program by either; detaching the card and mailing, ordering online or faxing the gift orders to the consultant for processing. No expiration date shall be placed on the pre-paid card. **The expiration date for the redemption of gifts shall be determined by the consultant with Authority approval.**

The items to be included in the catalog are to be recommended by the consultant and approved by the Authority. All gifts will include the Authority logo shown below:



CATALOG GIFTS

1. The Employee Service Award Program catalog shall provide special recognition to employees who complete 10 years of service and at five-year intervals (i.e., 10, 15, 20, 25, 30, and 35) thereafter. For cost purposes, \$5.00 is budgeted for each year of service completed.
2. The cost of items in each plateau may be averaged out to the \$5.00 per year of service guidelines (e.g., \$25.00 for 5 years, \$50.00 for 10 years, etc.). In reaching this average, however, selections offered must be equally spread between those which are above and under the average and prices of individual items may not be lower nor higher than \$5.00 off the base average (e.g., selections in the 5-year group could range from \$20.00 to \$30.00, but must be equally distributed).
3. Selections offered by consultants must include both gift and jewelry items for each plateau of service, and roughly the same number of items in each category.
4. Categories in all catalogs must include selections suitable for:
 - a) Both home and office.
 - b) Both males and females in equal proportions.
 - c) Field workers (example – Bus Operations, General Maintenance, Automotive/Bus Maintenance, ext) as well as office employees, in equal proportions.

5. There must be a minimum of 20 gift options (more are acceptable) for both gifts and jewelry items in each catalog group (10, 15, 20, 25, 30, 35 years). This requires a minimum of 120 different options overall. A single sheet listing of the gifts for each year group must be included, showing consultant's identifying gift numbers, the method of customizing gift to be used and a brief description of each gift.
6. Unit prices shall not be displayed in the catalog.
7. Consultant shall supply all dies, engraving plates, embossing tools, screens and printing set-ups at no additional charge. All items must include the Authority identification logo. Items that do not include the Authority logo must be approved by the Authority prior to placement in the catalog.
8. All jewelry items must be put in gift boxes with protective cardboard slip jacket and all items must be shipped in protective wrapping.
9. Consultant shall provide rings and watches to be engraved with individual name or initials, Authority identification, and years of service. Other items to be similarly engraved/identified, either by tags, plates or other appropriate devices at no additional charge for engravings.
10. Consultant shall provide a supply of catalogs in sufficient quantities to distribute to each eligible employee. If there is no charge for these, it must be so stated. If there is a charge, it must be stated separately and not included in unit prices of the gifts. Consultants must agree to provide updated catalogs when changes in gift offerings are made, following prior approval from Authority.
11. Invoice(s) shall include a detailed list of the item(s) ordered, and a single charge for shipping fees. Shipping charges are not to be included in the gift/jewelry cost. Consultant shall be responsible for shipping charges for back-ordered, incorrectly billed or damaged items.
12. Consultant shall accept return of all awards for full credit in the event the eligible employee has a change of heart or has separated from the Authority. Also, consultant shall exchange merchandise that is returned within 30 days of Authority acceptance provided it is returned in original packaging and in same condition as originally received.
13. Consultant shall provide a minimum one (1) year warranty for all jewelry, watches, clocks, barometers and similar items.
14. Consultant shall be directly responsible for all repairs and incidental repairs to avoid the need for Authority to deal directly with a manufacturer.
15. Consultant shall provide complete packaging at no extra charge to include labeling on the outer wrapping of gifts with name of recipient, department/office, and years of service.

16. No substitutions of gift items published in catalogs shall be made without the prior approval of the Authority.
17. Consultant shall not impose restrictions as to order frequency or size of orders.
18. Consultant shall comply with the Authority's ordering schedule and ship ordered items within 30 days of receipt of order(s).
19. Consultant shall furnish an alphabetical list (by name and showing gift selected) as part of the consultant's acknowledgment of the Authority's order.

At the conclusion of the determined year, Consultant shall provide the Authority an itemized report of gift items that were shipped and their quantities.

In order to be qualified for consideration, proposals must respond to and meet all requirements at the minimum level where indicated.

BUDGET

The budget allocated for this project is \$30,000 in the 2010 calendar year for certificates, gifts, tax and shipping. There are approximately 600 employees that will need to receive a service award in 2010.

PRICE SUMMARY SHEET

REQUEST FOR PROPOSALS (RFP)

REQUEST FOR PROPOSAL NO.: 9-0915

DESCRIPTION OF SERVICES: EMPLOYEE SERVICE AWARDS

COMPANY'S NAME AND ADDRESS: _____

NAME AND TELEPHONE NO. OF _____
AUTHORIZED REPRESENTATIVE _()

FACSIMILE NO.: _()

EMAIL ADDRESS: _____

BLANKET PURCHASE ORDER

Enter the proposed price for Employee Service Awards as described in the Scope of Work, Exhibit A. Gift pricing shall be firm fixed price, which shall include direct costs, indirect costs, and profits. Employee Service Awards may be utilized at the Authority's sole judgment, for the Authority's General Services Department requirements on an as-requested basis, with no guaranteed usage. It is anticipated that the Blanket Purchase Order resulting from this solicitation, if awarded, shall be for work specified in Exhibit A, Scope of Work.

On the Price Summary Form:

Enter the individual price per single unit (Certificate and Pin/Pen/Catalog Gift) in the "Price Per Award" Column for each year of service. Enter the total amount ("Price Per Gift" x "No of Employees") in the "Estimated Price" Column for each year of service.

On the Gift Selection Form:

Enter each individual item, a brief description of the item, and a picture of the item for the specified service year. A minimum of 20 choices per catalog with a minimum of 140 different choices over six (6) catalogs.

Price Summary Form

Quantities listed on the Price Summary Form are for evaluation purposes only and do not imply any guaranteed minimum or maximum usage by the Authority. Prices quoted on the "Price Summary Form" below shall remain firm for the term of the Blanket Purchase Order.

<u>Years of Service</u>	<u>Award Description</u>	<u>Price Per Gift</u>	<u>No. of Employees</u>	<u>Estimated Price</u>
1 Year	Certificate & Authority Enamel Pin	\$____.00	52	\$_____.00
3 Years	Certificate & Authority Enamel Pen	\$____.00	143	\$_____.00
5 Years	Certificate & 5 Year Pin with Simulated Ruby	\$____.00	111	\$_____.00
10 Years	Certificate & 10 Year Catalog Gift	\$____.00	81	\$_____.00
15 Years	Certificate & 15 Year Catalog Gift	\$____.00	14	\$_____.00
20 Years	Certificate & 20 Year Catalog Gift	\$____.00	47	\$_____.00
25 Years	Certificate & 25 Year Catalog Gift	\$____.00	21	\$_____.00
30 Years	Certificate & 30 Year Catalog Gift	\$____.00	29	\$_____.00
35 Years	Certificate & 35 Year Catalog Gift	\$____.00	13	\$_____.00
SUB TOTAL PRICE				\$_____.00
TAX (8.75%)				\$_____.00
TOTAL ESTIMATED PRICE				\$_____.00

Gift Selection Form

_____ Year Catalog

	Catalog Gift	Description
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		
20.		

Each catalog must be clearly stated.
A customized Gift Selection Form may be created by the proposing consultant.

In signing this form, consultant acknowledges receipt of Exhibit A entitled "Scope of Work," which is by this reference incorporated herein.

Acknowledgement receipt of RFP 9-0915 and Addendum Number(s) _____

This offer shall remain firm for 120 days from date of proposal submission.

AUTHORIZED TO BIND OFFER: _____

PRINT SIGNER'S NAME AND TITLE: _____

DATE SIGNED: _____