




March 21, 2019

To: Legislative and Communications Committee 
From: Darrell E. Johnson, Chief Executive Officer
Subject: Agreement for Public Outreach for Rail Capital Projects

Overview

Consultant services are needed to support public communications and community outreach support for five rail capital projects, other rail projects as part of the Southern California Optimized Rail Expansion Program, and for additional Metrolink projects in Orange County. Proposals were received in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested to select a firm to provide public outreach for the rail capital projects.

Recommendations

- A. Approve the selection of Katz & Associates, Inc., as the firm to provide public outreach for the rail capital projects.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-8-2074 between the Orange County Transportation Authority and Katz & Associates, Inc., in the amount of \$548,981, for a four-year initial term, through April 30, 2023, with one, one-year option term to provide public outreach for the rail capital projects.

Discussion

The Orange County Transportation Authority (OCTA) Board of Directors' (Board) approval of the Next 10 Delivery Plan advances Measure M2 projects and programs over a ten-year period (2017-2026). Measure M Project R, also referred to as the Metrolink Service Expansion Program (MSEP), is part of the Next 10 Plan, and will provide for sustained and expanded rail service, station improvements, and safety and operational improvements to railroad infrastructure.

There are five MSEP projects currently in various phases, as well as several Southern California Optimized Rail Expansion Program (SCORE) projects. The MSEP projects include, but are not limited to, the Anaheim Canyon Metrolink Station (design), Placentia Metrolink Station (design), Laguna Niguel to San Juan Capistrano Passing Siding (construction), and San Juan Creek Bridge Replacement (environmental) and Slope Stabilization (construction). The SCORE projects include the Orange County Maintenance Facility and six other rail projects that will include improvements such as signal respacing, adding new tracks, and station modifications.

Consultant services are needed to develop and execute public communications and outreach support for each project. An outreach consultant with experience in capital improvement projects to create and implement these programs helps assure OCTA delivers a high-quality public outreach program that is consistent with OCTA outreach in other modes and projects. Consultant services will aid OCTA's efforts to generate public awareness of the projects, identify key issues and stakeholders, and ensure the community is aware of the activities that will affect them. The projects are located in multiple cities, including, but not limited to, the cities of Anaheim, Irvine, Laguna Niguel, Lake Forest, Mission Viejo, Placentia, and San Juan Capistrano.

Procurement Approach

This procurement was handled in accordance with OCTA's Board-approved procedures for professional and technical services. Various factors were considered in the award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On December 10, 2018, Request for Proposals (RFP) 8-2074 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on December 10 and 18, 2018. A pre-proposal conference was conducted on December 18, 2018, with attendees representing five firms. Two addenda were issued to make available the pre-proposal conference registration sheets and presentation, as well as to respond to written questions and handle administrative issues related to the RFP.

On January 8, 2019, six proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, External Affairs, Public Outreach, Capital Programs, Marketing and Customer Engagement, and M2 Program Management Office met to review all proposals received.

The proposals were evaluated based on the following evaluation criteria and weights:

- Qualifications of the Firm 20 percent
- Staffing and Project Organization 30 percent
- Work Plan 30 percent
- Cost and Price 20 percent

Several factors were considered in developing the evaluation criteria weights. Staffing and project organization and work plan were both weighted highest at 30 percent each to emphasize the importance of delivering a successful and effective public communications and outreach program. The project team had to demonstrate its ability to decipher technical information and communicate it in a manner that is easily understandable to the public, as well as developing effective communication strategies by building upon experience in similar outreach projects. The firm also had to demonstrate its ability to address the complexities of each improvement project's specifications, as well as the cities and other key stakeholders. The firm had to detail its strategic approach to meeting the project requirements by including personalized tactics for different stakeholders to problem-solve issues, develop project collateral, provide outreach events logistics and support, manage a stakeholder database, gather and document public feedback, and measure results. Qualifications of the firm was weighted at 20 percent as the firm had to demonstrate experience conducting outreach programs for rail improvements or similar projects. Cost was also weighted at 20 percent to ensure competitive hourly rates and that OCTA receives value for the services provided.

The evaluation committee utilized a best-value selection process for this RFP. The best-value determination is based on a 100-point scale. The RFP required proposing firms to submit a separate price proposal in a sealed package. In order to focus on the technical aspects of the proposals, the evaluation committee first evaluated the written proposals on technical merit based on the weighted criteria for qualifications of the firm, staffing and project organization, as well as work plan, which represented a maximum of 80 points of the total proposal score. Once a short-list of top-ranked firms within a competitive range was developed based on the technical scores of the proposals, the sealed price proposals were opened only for the short-listed firms. The pricing score represented a maximum of 20 points of the total proposal score.

On January 23, 2019, the evaluation committee reviewed the proposals based only on the technical evaluation criteria and short-listed the four most qualified firms listed below in alphabetical order:

Arellano Associates (Arellano)
Chino Hills, California

Barrios and Associates, LLC doing business as Communications LAB
(Comm LAB)
Orange, California

Katz & Associates, Inc. (Katz)
San Diego, California

Kleinfelder Construction Services, Inc. (Kleinfelder)
Laguna Hills, California

On January 31, 2019, the evaluation committee conducted interviews with the four short-listed firms. The interview consisted of a presentation to demonstrate the firms' understanding of OCTA's requirements. The firms' project managers, community liaisons, and key team members had an opportunity to present each team's qualifications and respond to the evaluation committee's questions. Questions were related to coordinating and communicating with key stakeholders, generating awareness for the underrepresented and diverse groups, managing availability and commitments to current assignments, and preparing an outreach plan for a track closure. In addition, each team was asked specific clarification questions related to its proposal.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary rankings and made adjustments to individual technical scores. The sealed price proposals from the four short-listed firms were then opened and scored. As a result, the ranking of the third- and fourth-ranked firms changed. However, Katz remained the highest-ranked firm with the highest overall score.

Based on the evaluation of the written technical proposals, the information obtained from the interviews, and the price proposals, the evaluation committee recommends Katz for consideration of the award. The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

Katz has been providing strategic communication and public relation services since 1986. The firm has 40 employees and three offices located in the cities of Los Angeles, San Diego, and San Francisco. Katz demonstrated the most relevant and diverse rail experience to showcase its ability to tailor outreach based on the uniqueness of the affected areas. Katz provided public outreach

services for the San Diego Association of Governments (SANDAG) trolley renewal project, which involved upgrading infrastructure and station amenities. Katz also worked with SANDAG on the mid-coast trolley project to inform residents and businesses impacted by the relocation of existing utility infrastructure. The firm provided public outreach services to OCTA on the rail safety education and outreach program, as well as railroad crossing safety enhancements. In addition, Katz is currently providing public outreach services for the OC Streetcar project. Katz proposed to utilize a subcontractor to provide multicultural outreach services.

Arellano was established in 1994 and has 45 employees with a main office in the City of Chino Hills. The firm has worked with OCTA on multiple public outreach efforts, such as the Long-Range Transportation Plan, OC Streetcar, OC Bridges, and Laguna Niguel to San Juan Capistrano Passing Siding Project. The firm has also worked with the City of Anaheim during the design and construction phases of the Anaheim Regional Transportation Intermodal Center project, as well as with the Riverside County Transportation Commission providing Metrolink marketing services, public outreach support during the construction of the Perris Valley line, and railroad safety. Arellano proposed to utilize a subcontractor for branding and marketing services.

Kleinfelder is a wholly-owned subsidiary of Kleinfelder, Inc., and has been in business since 1986 with 72 employees. The firm is headquartered in the City of San Diego with offices throughout the United States, Canada, and Australia, as well as an office in the City of Laguna Hills. Kleinfelder has provided public communications and community outreach support for OCTA's rail capital projects, public relations and graphic design services for Orange County Public Works, and public outreach services for the San Bernardino County Transportation Authority (SBCTA) passenger rail project. The firm currently serves as the prime outreach consultant for the Interstate 405 (I-405) Improvement Project. Kleinfelder proposed to utilize four subcontractors for printing, translation, canvassing, and mailhouse services.

Comm LAB began as a sole proprietorship in 2005 and was incorporated in 2013. The firm has 11 employees with an office in the City of Orange. Comm LAB has worked with OCTA on various Interstate 5 (I-5) projects, such as the State Route 73 to El Toro Road Environmental Phase, Avenida Pico to San Juan Creek Road Construction and Final Design, and the I-5 Gateway Project. Comm LAB also provided outreach services to SBCTA on the Redlands Passenger Rail Project, as well as to the Transportation Corridor Agencies on the State Route 241 Extension and South Orange County Mobility Study. While the firm demonstrated experience with capital improvement projects, Comm LAB had less experience with rail-related projects than the other

firms. The firm proposed to utilize two subcontractors to provide direct mail and canvassing services.

Staffing and Project Organization

Katz proposed a project team with public outreach experience. The proposed project manager has ten years of experience related to long-term communication programs, community outreach, public meeting coordination, construction relations, and event planning. The firm proposed six community liaisons and two account coordinators to ensure availability of coverage for each of the rail improvement projects as some individuals are part of the OC Streetcar outreach team. The lead community liaison has over ten years of experience. The proposed graphic designer has 20 years of experience related to capital improvement projects. Additionally, the team included a bilingual community liaison, as well as a multicultural liaison with relationships with the African American, Asian, and Latino communities. During the interview, the project team members discussed their roles and approach for conducting outreach, and responded to the evaluation committee's questions.

Arellano proposed a project team with public outreach experience. The proposed project manager has 28 years of experience related to community infrastructure and public outreach programs. The firm proposed two community liaisons with 15 and eight years of experience, respectively. The proposed graphic designer has over ten years of experience, and the proposed account coordinator has seven years of experience. The project team includes bilingual team members. The project team members discussed their approach and strategies, as well as responded to the evaluation committee's questions during the interview.

Kleinfelder proposed a project team with public outreach experience. The proposed project manager has 18 years of experience in public relations, marketing, and outreach. The proposed community liaison has five years of experience, mainly as an account coordinator and outreach assistant with limited experience as a lead community liaison. The proposed graphic designer and account coordinator both have 15 years of experience. The proposed project team members also serve as the outreach team for the I-405 Improvement Project. During the interview, the firm discussed their approach and responded to the evaluation committee's questions regarding the ability of one team handling multiple projects.

Comm LAB proposed a project team with public outreach experience. The proposed project manager has 18 years of experience in strategic planning, community outreach, and media relations. The proposed community liaison has 25 years of experience, including developing grassroots outreach strategies and

translating technical information. The proposed graphic designer has two years of experience, and the proposed account coordinator, bilingual in Spanish, has over ten years of experience. The project team discussed its strategies and responded to the evaluation committee's questions during the interview.

Work Plan

Katz presented a work plan that addressed all the elements in the scope of work. The firm discussed its blend of traditional and innovative approach for each outreach activity and specified deliverables, as well as methods for tracking outreach efforts. The firm noted examples for the communications and outreach plan, such as creating a project-specific hashtag, conducting stakeholder interviews and surveying, collaborating with English as a Second Language (ESL) academies and developing ESL worksheets to engage diverse communities, holding pop-up events at transit hubs, and utilizing elevator and lobby digital notice boards. Katz discussed utilizing a software system, NationBuilder, for stakeholder and query database management and electronic notifications. The firm provided specific examples of potential issues and detailed proposed solutions, such as ensuring safety messages are prioritized, engaging multicultural communities, and mitigating public concerns about the projects. Katz also proposed enhancements, which include developing a dedicated mobile application (app) that provides real-time information, implementing advertisements using the Waze app, sending mass, multi-language automated text messages, and engaging Orange County youths with an art competition.

In its work plan, Arellano discussed its approach and tactics for the communication and outreach plan, such as public noticing and promotional plan for project awareness, targeted engagement with interested audiences, high-quality written and visual communications, and maximum distribution of information. Some traditional techniques include door hangers and flyers, signage, virtual meetings, and public events and community meetings. The firm also discussed developing a community database to engage stakeholders. Arellano proposed utilizing software systems, such as Smartsheet for project management and Billquick for project controls. Arellano proposed leveraging technology, such as electronic surveys on iPad kiosks, geosocial interactive maps, geofencing, and interactive flat screens.

Kleinfelder addressed each element of the scope of work in its work plan. The firm provided a general overview of each rail improvement project, which included maps and project insights. The firm indicated that it would keep the community and stakeholder database up-to-date by scrubbing the information quarterly. Kleinfelder listed potential challenges that may arise for each project,

such as the impacts of a new Placentia Metrolink Station, coordination with stakeholders on the Laguna Niguel/Mission Viejo Passing Siding, and informing recreational groups about the impacts of the San Juan Creek Railroad Bridge Replacement Project. However, the firm did not elaborate on specific solutions for the identified challenges. The firm proposed enhancements that include creating 3D/4D videos, renderings, and animations embedded on the project website, using Story Mapping and an interactive map to introduce the projects, and updating cyclists with the LaneSpotting app.

Comm LAB discussed the elements of its outreach plan with various strategies, such as open houses, neighborhood meetups, listening tours and story walks, a project hotline, and public surveys. The firm discussed using Smartsheet for project management and developing project-specific databases to facilitate communication with stakeholders. Comm LAB indicated that it will leverage its familiarity with Orange County residents, businesses, and organizations to anticipate and diffuse any potential issues. The firm noted that the proposed community liaison and account coordinator will obtain certification as Operation Lifesaver instructors, which will provide Comm LAB access to proven and cost-effective safety information to provide education and information materials.

Cost and Price

Price scores were based on a formula which assigned the highest score to the firm with the lowest weighted average hourly rate, and scored the other proposals' weighted average hourly rates based on their relation to the lowest weighted average hourly rate. Although Katz did not propose the lowest weighted average hourly rate, it was competitive among the proposing firms.

Procurement Summary

Based on the evaluation of the written proposals, the firms' qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of Katz as the top-ranked firm to provide public outreach for the rail capital projects.

Fiscal Impact

The rail capital projects were approved in OCTA's Fiscal Year 2018-19 Budget, External Affairs. These projects are funded by a combination of federal, state, and local Measure M2 funds.

Summary

Based on the information provided, staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-8-2074 between the Orange County Transportation Authority and Katz and Associates, Inc., in the amount of \$548,981, for a four-year initial term, with one, one-year option term, to develop and conduct a comprehensive public outreach program for the rail capital projects.

Attachments

- A. Review of Proposals, RFP 8-2074 Public Outreach for Rail Capital Projects
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 8-2074 Public Outreach for Rail Capital Projects
- C. Contract History for the Past Two Years, RFP 8-2074 Public Outreach for Rail Capital Projects

Prepared by:



Calina North
Community Relations Officer,
External Affairs
(714) 560-5749

Approved by:



Lance M. Larson
Executive Director,
External Affairs
(714) 560-5908



Virginia Abadessa
Director, Contracts Administration
and Materials Management
(714) 560-5623