




March 18, 2021

To: Legislative and Communications Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Agreement for Public Communications and Community Outreach Consultant Services for the State Route 55 Improvement Project Between Interstate 405 and Interstate 5

Overview

On April 27, 2020, the Board of Directors approved the release of a request for proposals for public outreach consulting services during the pre-construction and construction phases of the State Route 55 Improvement Project between Interstate 405 and Interstate 5. 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 execute an agreement for these services.

Recommendations

- A. Approve the selection of Costin Public Outreach Group, as the firm to provide public outreach consulting services for the State Route 55 Improvement Project between Interstate 405 and Interstate 5.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2104 between the Orange County Transportation Authority and Costin Public Outreach Group, in the amount of \$1,684,990 for a five-year initial term, effective through September 30, 2025, with an option term of up to 36 months, to provide public outreach consulting services for the State Route 55 Improvement Project between Interstate 405 and Interstate 5.

Discussion

The Orange County Transportation Authority (OCTA), in cooperation with the California Department of Transportation (Caltrans), is improving State Route 55 (SR-55) between Interstate 405 (I-405) and Interstate 5 (I-5). The \$474 million SR-55 Improvement Project (Project) is adding one regular lane and one

high-occupancy vehicle lane in each direction, as well as auxiliary lanes between several interchanges. SR-55 is the major freeway route connecting Orange County to Riverside and San Bernardino counties. The corridor is also a major route for accessing key business centers, John Wayne Airport, and the beach cities. The four-mile Project includes improvements at five under- and over-crossings, constructing retaining walls and soundwalls, reconfiguring on- and off-ramps, and reconstructing a channel. The Project recently completed final design. Right-of-way (ROW) is anticipated to be certified in mid-2021 and the Project advertised for construction in winter 2021. Construction is scheduled to begin in mid-2022.

Consultant services are needed to develop and execute public communications and outreach support during the pre-construction and construction phases. More than 15,000 residential and commercial parcels are located within a half-mile of the Project area. Extensive outreach efforts are needed to communicate major activities to residents, business owners, and motorists, as well as key stakeholders such as local agencies and trucking and tourism industries. Activities include long- and short-term freeway, ramp, and local street closures, demolition and reconstruction work, and wall construction.

These consultant services will aid OCTA and Caltrans with the development and delivery of day-to-day communications and share public information messages that help the public understand temporary construction impacts as well as the value and benefits of investments in Orange County's transportation network. The selected consultant will implement a comprehensive SR-55 public outreach program using traditional methods and leveraging innovative tools to generate public awareness of the project, identify key issues, build upon stakeholder ascertainment, and ensure the community is aware of the activities that will affect them.

The consultant will use various outreach tools and methods to reach businesses, residents, and those beyond the project area. These include virtual and in-person meetings with stakeholders, email newsletters, neighborhood meetings, an interactive closures and detours map, text alerts, and a Project website and hotline. In addition, the consultant will build on the Project's social media presence. The consultant will build relationships with diverse and disadvantaged communities and develop strategies to eliminate or address communication obstacles such as language barriers and access to the internet. The consultant also will develop a variety of print and digital collateral and video graphics that will feature strong visual storytelling. Special event planning and execution of a groundbreaking ceremony, milestone celebrations, and a dedication event will be included in the communications plan.

Procurement Approach

The procurement was handled in accordance with OCTA's Board of Directors (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 April 27, 2020, the Board authorized the release of Request for Proposals (RFP) 0-2104, which was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on April 27 and May 4, 2020. A pre-proposal conference took place on May 5, 2020 with 12 attendees representing eight firms. Three addenda were issued to make available the pre-proposal conference registration sheet and presentation, as well as respond to written questions related to the RFP.

On May 27, 2020, six proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Public Outreach, Capital Programs departments, as well as external evaluators from the City of Santa Ana and Caltrans met to review the proposals received.

The proposals were evaluated based on the following Board-approved evaluation criteria and weightings:

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| • 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 weightings. Qualifications of the firm was weighted at 20 percent as the consulting firm had to demonstrate direct public outreach experience on complex transportation projects during the construction phase. Staffing and project organization was weighted at 30 percent as the proposing firm had to present an experienced team with a blend of senior and junior level staff having adequate availability, as well as experience performing outreach services on large construction projects. Work plan was also weighted at 30 percent as the plan had to consider the unique needs of a corridor primarily composed of commercial and industrial businesses that also serves motorists commuting from the Inland Empire to

Orange County as well as recreational trips. Additionally, the project team had to demonstrate an understanding of the project scope and challenges and level of effort required. Cost and price was weighted at 20 percent to ensure the outreach program is delivered efficiently 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 the technical scores of the short-listed firms were determined, the sealed price proposals were then opened. The pricing score represented a maximum of 20 points of the total proposal score.

On June 11, 2020, the evaluation committee reviewed the proposals based only on the technical evaluation criteria and short-listed the three most qualified firms listed below in alphabetical order:

Firm and Location

Costin Public Outreach Group (CPOG)
Corona, California

McCormick-Busse, Inc. doing business as MBI Media (MBI)
Covina, California

Westbound Communications, Inc. (Westbound)
Orange, California

The interviews took place virtually on June 17, 2020 and consisted of a presentation to demonstrate the firms' understanding of OCTA's requirements. The firms' project managers and key team members had an opportunity to present each teams' qualifications and respond to the evaluation committee's questions. Questions were related to the level of effort required for this Project, managing time and resource commitments, potential challenges, and handling crisis communications. 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 ranking and made adjustments to individual scores. However, CPOG remained the highest-ranked firm with the highest overall score.

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

Qualifications of the Firm

CPOG was founded in 2013 and has offices in the cities of Corona and Huntington Beach. The firm has six employees. CPOG demonstrated experience leading the development and implementation of public outreach programs for freeway projects during the construction phase, which include the San Bernardino Express Lanes Project and State Route 210 Lane Addition and Base Line Interchange Project for the San Bernardino County Transportation Authority, as well as the District 7 I-5 On-Call Public Awareness Campaign for Caltrans. One of the proposed subcontractors, Hill International, Inc., is the prime contractor that provided public outreach services for OCTA on the I-5 Central County Improvement Project during the final design and the construction phases. CPOG proposed additional subcontractors to provide diverse community outreach, video and photography, social media support, and translation support services.

MBI was founded in 1989 and has 23 employees. The firm is headquartered in the City of Covina. The firm has experience providing public outreach for complex freeway projects, such as the I-405 Improvement Project and the SR-55 between I-5 and State Route 91 (SR-91) Improvement Project for OCTA, the SR-91 Corridor Improvement Project for the Riverside County Transportation Commission (RCTC), and the US 101 Improvement Project for Ventura County Transportation Commission. Although MBI has worked on similar construction projects, the firm has primarily served in a subcontractor capacity. The projects in which MBI performed as the prime consultant were during the environmental phase. One of their proposed subcontractors, Kleinfelder Construction Services, Inc. (Kleinfelder), is the prime contractor currently providing public outreach services for the I-405 Improvement Project.

Westbound was founded in 2003 and is headquartered in the City of Orange with offices in the cities of Long Beach and Riverside. The firm has 17 employees. Westbound demonstrated experience in leading public outreach programs for

various capital improvement projects during the construction phase, which include the Gerald Desmond Bridge Replacement Project for the Port of Long Beach, State Route 57 Northbound Widening Project for OCTA, and the 91 Steer Clear Project for RCTC. The firm also served as the public outreach lead for the contractor team for RCTC's SR-91 Corridor Improvement Project. Westbound proposed several subcontractors to provide additional support related to graphic design, videography, photography, printing, research, and website and mobile application development.

Staffing and Project Organization

CPOG proposed a project team with extensive experience. The proposed project manager is the firm's founder and has 26 years of public outreach and stakeholder engagement experience. CPOG proposed four community liaisons with experience providing public outreach during the construction phase, as well as familiarity with the project corridor and stakeholders. The proposed dedicated community liaison has 12 years of experience. The dedicated community liaison has worked on multiple OCTA freeway projects in various phases, including participating in design meetings for this corridor and planning for a Public Hearing for the neighboring SR-55 segment between I-5 and SR-91. Additionally, the proposed lead community liaison will bring another level of understanding and knowledge of the area from her recent experience working on the I-5 Central County Improvements Project at the northern end of the project limits. CPOG's project team includes four bilingual Latino and Asian community liaisons with freeway construction experience to engage underserved and traditionally hard-to-reach populations. The proposed subcontractor, Lazar, is also available to provide additional translation and interpretation support, if needed.

The project team is proposed with ample availability for the Project. During the interview, the project team members discussed their roles and approach for developing and implementing the public outreach program. The project team's presentation and responses to the evaluation committee's questions demonstrated their understanding of the project corridor and stakeholders, as well as the activities and challenges specific to the Project, such as ROW and temporary construction easements (TCE).

MBI proposed a project team with relevant experience. The proposed project manager has 18 years of project management experience and has been with the firm for almost 20 years. The firm proposed three community liaisons for this effort. One of the proposed community liaisons is from Kleinfelder and is currently serving as the project manager on the I-405 Improvement Project,

which demonstrates the individual's experience providing public outreach for a complex construction project. However, the other two community liaisons proposed have limited experience leading public outreach efforts during the construction phase. The project team is proposed with sufficient availability for this effort. During the interview, the project team presented its approach, as well as responded to the evaluation committee's questions, which demonstrated a general knowledge of the project area and stakeholders.

Westbound proposed a knowledgeable and experienced project team. The proposed project manager has more than 25 years of public relations and communications experience and has been with the firm for four years. The firm proposed three community liaisons with each assigned to provide outreach to specific stakeholder groups rather than all three proposed to support outreach efforts for any given group or task. The community liaison for the Hispanic market has more than 20 years of experience providing public outreach services for several freeway construction projects and has been with the firm for 14 years. The other two proposed community liaisons have limited freeway construction outreach experience. During the interview, the project team discussed their roles and approach to leading the public outreach program. The team's presentation and responses to the evaluation committee's questions demonstrated their understanding of the diverse communities along the corridor and the importance of strategically communicating with those stakeholders. However, the project team's availability was not specified in the proposal nor was it clarified after being asked by the evaluation committee during the interview.

Work Plan

CPOG presented a comprehensive work plan that addressed all the elements of the scope of work. The firm detailed its approach for the public outreach program, which includes expanding the project database through stakeholder ascertainties, refreshing the project branding, developing messages that convey the Project's benefits, planning and coordinating community meetings, posting electronic construction notices, and establishing a project helpline. CPOG demonstrated an understanding of the project area and the key stakeholders affected by the Project.

In addition, the firm discussed its approach to engaging with diverse communities along the project corridor. The firm has a "boots-on-the-ground" approach to reach diverse communities including, but not limited to seniors, low-income, and monolingual populations. CPOG recognizes that with Latino ethnicity percentages of more than 80 percent in Santa Ana and 40 percent in Tustin, their approach to deliver project information must be sensitive to their

communications and cultural needs. The firm indicated the importance of an overall communications program that shares information in the language spoken, in a correct and respectful manner and in compliance with Title VI requirements.

The firm demonstrated an understanding of the impacts of ROW, TCEs, as well as pre- and post-construction surveys, and discussed how it will provide related public outreach support. CPOG identified potential issues and proposed solutions, such as coordinating temporary lodging for impacted stakeholders, providing advanced notification of freeway closures, and implementing safety message boards and signages. The firm also proposed enhancements, such as providing utility relocation outreach, developing a construction safety awareness program, and virtual events.

MBI addressed each element of the scope of work in its work plan, such as conducting stakeholder ascertainties, developing a comprehensive public outreach plan, enhancing the Project's identity and branding, developing collateral materials, implementing an interactive map, and updating the project website. Although the firm discussed its approach and understanding of the key stakeholders, the firm did not elaborate on how it will communicate and provide outreach to businesses and residents directly impacted by ROW acquisitions and TCEs. MBI discussed how it will mitigate potential issues, such as developing communication specifically to stakeholders directly impacted by the construction activities, including residents living close to the project corridor, first responders, and schools. As an enhancement, the firm proposed to leverage digital and virtual strategies by using digital platforms, such as Microsoft Teams and Zoom, to conduct public meetings and respond to public inquiries.

Westbound demonstrated a clear understanding of the scope of work in its work plan. The firm discussed its approach and elaborated on its outreach strategies, such as developing a message that connects constituents and stakeholders, leverage existing relationships to engage the impacted communities, providing on-call availability at all times, using visuals to communicate the need and benefits of the Project, and utilizing digital outreach tools. Westbound detailed how it will complete various outreach activities by providing examples and identifying related deliverables. Westbound demonstrated an understanding of the project area and key stakeholders in its discussion of creating project advocates, coordinating community meetings, outreach to local businesses and apartment complexes along the corridor. The firm did not specify any special issues or problems anticipated for this Project. The firm proposed various enhancements, such as a text message system for updates, live camera feed to

show real-time progress, in-person construction tours, and interactive architectural visualization.

Cost and Price

Pricing 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 rate based on its relation to the lower weighted average hourly rate. Although MBI proposed the lowest weighted average hourly rate, CPOG ranked second lowest in pricing and the firm's proposed hourly rates are deemed fair and reasonable.

Procurement Summary

Based on the evaluation of written proposals, the firms' qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of CPOG as the top-ranked firm to provide public outreach consulting services for the SR-55 Improvement Project between I-405 and I-5. CPOG delivered a thorough and comprehensive proposal and an interview that was responsive to all the requirements of the RFP.

Fiscal Impact

The SR-55 Improvement Project between I-405 and I-5 was approved in OCTA's Fiscal Year 2020-21 Budget, External Affairs, Account No. 0017-7519-FF101-TYP. The Project is funded by a combination of federal, state, and local Measure M2 funds.

Summary

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2104 between the Orange County Transportation Authority and Costin Public Outreach Group, in the amount of \$1,684,990, for a five-year initial term, with an option term of up to 36 months, to provide public outreach consulting services for the State Route 55 Improvement Project between Interstate 405 and Interstate 5.

Attachments

- A. Review of Proposals, RFP 0-2104 Public Outreach for State Route 55 Improvement Project
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 0-2104 Public Outreach for State Route 55 Improvement Project
- C. Contract History for the Past Two Years, RFP 0-2104 Public Outreach for State Route 55 Improvement Project

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