



***June 16, 2022***

**To:** Legislative and Communications Committee  
**From:** Darrell E. Johnson, Chief Executive Officer  
**Subject:** Agreement for On-Call Marketing Print Services

***Overview***

The Orange County Transportation Authority requires the services of a firm to provide on-call marketing print services. A competitive procurement has been conducted and 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 to continue providing on-call marketing print services.

***Recommendations***

- A. Approve the selection of Pacific Graphics, Inc., as the firm to provide on-call marketing print services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-2-2288 between the Orange County Transportation Authority and Pacific Graphics, Inc., in the amount of \$325,000, for a three-year initial term with two, two-year option terms to provide on-call marketing print services.

***Discussion***

The Orange County Transportation Authority (OCTA) develops and implements transportation programs designed to reduce traffic congestion and improve air quality, in addition to operating the countywide bus services. OCTA communicates with Orange County residents and current bus customers with a variety of printed materials throughout the year to provide information and updates about OCTA's services and programs.

These printed materials vary in color from one to four colors for graphics and/or photos, with quantities ranging from hundreds to tens of thousands of pieces. The types of printed materials include but are not limited to booklets, brochures,

flyers, and direct mail pieces. Many of these printed pieces are delivered to bus bases and OCTA headquarters for distribution to the public. OCTA also utilizes direct mail campaigns that in some cases need individualized addresses, as well as the proper sorting and drop-off locations required by the United States Postal Services (USPS).

OCTA both operates an in-house printing facility and utilizes a contractor for printing needs that exceed the resources of the in-house printing facility. The in-house facility generally can accommodate limited lower quantity printed pieces up to a 13"x18" paper size. Occasionally, the in-house printing facility cannot accommodate the workload or scale of printing requirements needed, so these jobs are sent to an outside printer on an as-needed basis. Many direct mail campaigns require sorting according to USPS requirements, and an outside firm is more appropriately resourced to perform this task. Due to the specialized needs of some print campaigns and certain limitations of the in-house printing facility, a contracted printing and mail-house fulfillment firm is needed to assist with higher quantities and more complex printed materials.

OCTA's current contract with Pacific Graphics, Inc. (PGI) for marketing print services is set to expire on June 30, 2022. A new contract is needed to print and deliver materials needed in support of OCTA marketing and communication programs. Historically, OCTA has held shorter-term contracts (one to two years) for these services; however, it was determined that the on-call printing program will benefit from a longer term (seven years including option terms) as it will allow for a consistent workflow and potential cost savings from higher print volume commitments resulting from a multi-year agreement.

### ***Procurement Approach***

The procurement was handled in accordance with OCTA Board of Directors (Board)-approved procedures for professional and technical services. Various factors are 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 March 15, 2022, Request for Proposals (RFP) 2-2288 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on March 14 and March 21, 2022. A pre-proposal conference was held on March 22, 2022, with one attendee representing one firm. Two addenda were issued to provide a copy of the pre-proposal registration sheet and presentation, as well as respond to questions received.

On April 5, 2022, six proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, General Services, Marketing and Customer Engagement, and Special Transit Services departments met to review all proposals.

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

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

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm was weighted at 30 percent as the firm must have prior experience providing marketing print services. Staffing and project organization was weighted at 20 percent to ensure that the firm has an experienced project manager and staff to provide services as needed for printing and mail house projects. The work plan was also weighted at 20 percent to ensure the firm has an approach for meeting OCTA's requirements as specified in the scope of work. Finally, cost and price are assigned a weight of 30 percent to ensure OCTA receives the best value for the services provided.

On April 12, 2022, the evaluation committee reviewed the proposals based on the evaluation criteria and short-listed the two most qualified firms listed below in alphabetical order:

Firm and Location

Pacific Graphics, Inc. (PGI)  
City of Industry, California

The Castle Press (Castle Press)  
Anaheim, California

On April 19, 2022, the evaluation committee conducted interviews with both short-listed firms. The interview consisted of a video presentation and virtual tour of the firms' facilities to display their equipment and working environment. Each firm's project managers and key team members had an opportunity to present their team's qualifications and respond to the evaluation committee's questions. Questions were related to equipment availability and specifications, as well as staff responsibilities and quality control measures. In addition, each team was asked specific clarification questions related to their proposal.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary rankings and made adjustments to individual scores; however, the ranking of the firms remained unchanged.

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

#### Qualifications of the Firm

PGI was established in 1989 in the City of Industry, California. The firm has a 13,000 square-foot facility with 20 employees. PGI demonstrated relevant experience in the printing industry with work on projects similar to the scope of work. Current customers include the cities of Chino Hills, Perris, Pico Rivera, and San Marino, as well as Los Angeles County Metropolitan Transportation Authority, OCTA, and Southern California Regional Rail Authority. The firm did not propose to utilize any subcontractors as it has all equipment necessary to provide mailing, fulfillment, and distribution services as required per the scope of work. During the interview, the firm provided a detailed video of its facilities.

Castle Press is a printing firm founded in 1931 with 27 employees and based in Anaheim, California. The firm has experience working with government entities, cities, universities and colleges, as well as the Jet Propulsion Laboratory and Massachusetts Bay Transportation Authority. Castle Press provides all design, manufacturing, mailing and fulfillment services for the proposed project, and the firm did not propose to utilize any subcontractors. During the interview, Castle Press conducted a live facility tour to demonstrate the equipment that will be utilized to perform the required services. However, the tour missed some of the departments and the live feed was in poor visual quality, which made it difficult to see the condition and operability of the equipment.

#### Staffing and Project Organization

PGI proposed a knowledgeable project team with experience working on similar projects including OCTA's bus marketing print services. The proposed project manager has 33 years of experience working at PGI. The proposed supporting key staff have experience ranging from six to 33 years of experience in the printing industry. The firm's proposed staffing plan demonstrated availability for support and oversight of OCTA's printing and mail house needs. The project team's experience includes production management, production processes, mailing, and shipping. During their interview, the firm clearly discussed staff roles

and responsibilities, as well as explained staff background and experience with the company.

Castle Press proposed a knowledgeable staff for OCTA marketing print services. The proposed project manager has 25 years of experience in the printing industry and has one year of tenure with the firm. The proposed supporting staff has relevant experience including commercial printing and marketing, programming and database development, web design, photo retouching, and illustration. The firm did not include resumes or an organization chart as required by the RFP. During the interview, the firm discussed the roles and responsibilities of its proposed team.

#### Work Plan

PGI presented a work plan that addressed all elements of the scope of work. The firm discussed its approach to digital press printing, which can be printed and distributed in a 24 to 48-hour period, and digital variable data printing with standard turnaround on print jobs of five workdays. PGI also addressed its ability to print and distribute direct mail projects with quantities ranging from 30,000 to 50,000, and how it manages print requests from project scheduling, production, shipping, and delivery. Additionally, the firm described how its quality control process is implemented during each step of the work plan. Quality control checks are performed throughout the workflow from when the OCTA project manager submits a request for printing to when job ticket plates go to press to ensure successful deliveries. The firm has the ability to produce, deliver, or accept files from Adobe Creative Suite, Hi-Resolution PDF, Microsoft Office, and File Transfer Protocol electronic file transfer.

Castle Press provided a day-to-day plan for marketing and print services. The firm discussed its approach to implementing quality control measures to ensure successful delivery of print services, including detailed steps in providing standard operating procedures for each process a job requires. However, the processes provided focused on internal communication and didn't address feedback and communication with OCTA. The firm has compatibility for both personal computer and Macintosh and can provide one-off high resolution digital print proofs, as well as high-resolution Epson contract color proofs for lithographic press color match. During the interview the firm provided visuals of the equipment on-site that are proposed to perform the required scope of services.

### Cost and Price

Pricing scores were based on a formula which assigned the highest score to the firm with the lowest average weighted unit rate. The other proposals' average weighted unit rates were based on their relation to the lowest average weighted unit rate. PGI's rates were competitive among the firms; therefore, the firm's rates are deemed fair and reasonable.

### Procurement Summary

Based on the evaluation of written proposals and information obtained from the interviews, the evaluation committee recommends the selection of PGI as the top-ranked firm for marketing print services. The firm delivered a thorough and comprehensive proposal and an interview that was responsive to all requirements of the RFP.

### Fiscal Impact

OCTA and Bus Marketing and Communications printing services are included in OCTA's proposed Fiscal Year 2022-23 Budget and will be funded through the Orange County Transit District Fund 30 and OCTA General Fund F01.

### ***Summary***

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-2-2288 between the Orange County Transportation Authority and Pacific Graphics, Inc., in the amount of \$325,000, for a three-year initial term with two, two-year option terms, to provide marketing print services on an as-needed basis.

**Attachments**

- A. Review of Proposals RFP 2-2288 Marketing Print Services
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms) RFP 2-2288 Marketing Print Services
- C. Contract History for the Past Two Years, RFP 2-2288 Marketing Print Services

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