



**May 16, 2019**

**To:** Legislative and Communications Committee

**From:** Darrell E. Johnson, Chief Executive Officer

**Subject:** Agreement for Public Communications and Community Outreach for the Interstate 5 Improvement Project from State Route 73 to El Toro Road

### **Overview**

Consultant services are needed to support the public communications and community outreach program for the Interstate 5 Improvement Project from State Route 73 to El Toro Road. 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 communications and outreach services for the capital project.

### **Recommendations**

- A. Approve the selection of TRC Solutions, Inc., as the firm to provide public communications and community outreach for the Interstate 5 Improvement Project from State Route 73 to El Toro Road.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-8-2086 between the Orange County Transportation Authority and TRC Solutions, Inc., in the amount of \$771,410, for a six-year term, through June 30, 2025, to provide public communications and community outreach for the Interstate 5 Improvement Project from State Route 73 to El Toro Road.

### **Discussion**

The Orange County Transportation Authority (OCTA) Board of Directors (Board) is charged with implementing Measure M2, Project C, the Interstate 5 (I-5) Improvement Project from State Route 73 (SR-73) to El Toro Road. This project is a centerpiece of OCTA's freeway improvement projects in south Orange County.

The \$570 million project will increase capacity, enhance operations, and help relieve congestion by delivering various improvements, including a new northbound and southbound general-purpose lane, reconstruction of the Avery Parkway and La Paz Road interchanges, as well as several other structural and operational improvements. Situated next to the cities of Laguna Hills, Laguna Niguel, Lake Forest, and Mission Viejo, the project spans 6.5 miles and will be constructed in three distinct segments. Approval of the construction contract for the Oso Parkway to Alicia Parkway segment occurred on April 5, 2019, and construction is estimated to kick-off in mid-2019. On this major project, public communication and community outreach services are essential to generating widespread awareness and establishing channels of communications and relationships with residential, business, and stakeholder communities. In addition, communications and outreach are essential to proactive, comprehensive, and multimedia outreach with motorists, as well as protecting OCTA's reputation for delivering on its promises.

### ***Procurement Approach***

This procurement was handled in accordance with OCTA's 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 December 11, 2018, Request for Proposals (RFP) 8-2086 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on December 11 and 17, 2018. A pre-proposal conference was held on December 18, 2018, with attendees representing five firms. One addendum was issued to make available the pre-proposal conference registration sheets, respond to written questions, and handle administrative issues related to the RFP.

On January 28, 2019, seven proposals were received. An evaluation committee consisting of OCTA staff from the Contracts Administration and Materials Management, Public Outreach, Highway Programs, Public Information Office, and Government Relations departments met to review all proposals received.

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

- |                                     |            |
|-------------------------------------|------------|
| • 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. Staffing and project organization, as well as work plan, were both weighted highest at 30 percent to emphasize the importance of delivering a successful and effective public communications and outreach program with a clear strategy and approach. The project team needed to demonstrate its experience developing and implementing a strategic, comprehensive, and proactive public communications and community outreach program that will support the freeway project from construction kick-off to completion. Qualifications of the firm was weighted at 20 percent as the firm had to demonstrate experience conducting outreach programs for freeway projects or similar outreach 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 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 February 25, 2019, the evaluation committee reviewed the proposals based only on the technical evaluation criteria and short-listed the three firms listed below in alphabetical order:

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

TRC Solutions, Inc. (TRC)  
Irvine, California

Westbound Communications, Inc. (Westbound)  
Orange, California

On March 13, 2019, the evaluation committee conducted interviews with the three short-listed firms. The interviews 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 related to key messages, coordinating with key stakeholders, as well as communication and outreach opportunities, and challenges. 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 three short-listed firms were then opened and scored. A Request for Clarifications was sent to clarify the number of hours anticipated for each year for the six-year term, as well as the number of hours allocated for each member of the proposed project team for each year. The ranking of the first- and second-ranked firms changed, and TRC received the highest overall score.

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

#### Qualifications of the Firm

Each of the three firms demonstrated experience developing and conducting comprehensive public outreach programs.

TRC's public relations group was established more than 15 years ago as Caltrop Corporation (Caltrop). Caltrop was acquired in April 2017 by the engineering firm, TRC Companies, Inc. TRC has relevant public outreach

experience on numerous construction projects and employs more than seven employees in public outreach. TRC's experience includes providing public outreach for OCTA during the construction phase of the West County Connectors Project and the I-5 South County Improvement Project. Additionally, TRC provided outreach services for the California Department of Transportation District 7 during the construction phase along the I-5 Corridor, the California Incline Bridge Replacement Project in the City of Santa Monica, and the Riverside County Transportation Commission (RCTC) for the Interstate 15 (I-15) Express Lanes Design-Build Project.

Comm LAB was established in 2005. The firm has 11 employees with an office in the City of Orange. Comm LAB has worked with OCTA on various I-5 outreach projects, such as the project approval/environmental document (PA/ED) and the final design phases of the I-5 Improvement Project from SR-73 to El Toro Road; Avenida Pico to San Juan Creek Road Construction and Final Design; and the I-5 Gateway Project. Comm LAB also provided outreach services to San Bernardino County Transportation Authority's (SBCTA) Redlands passenger rail project, as well as the State Route 241 (SR-241) Extension and South Orange County Mobility Study for the Foothill-Eastern Transportation Corridor Agencies (TCA).

Westbound was founded in 2003 and is headquartered in the City of Orange. Westbound has 16 employees. The firm has provided outreach services for OCTA's State Route 57 (SR-57) northbound widening project; the PA/ED phase of the State Route 91 widening project between SR-57 and State Route 55; as well as the Interstate 605 Katella Interchange project in West Orange County. The firm provided community outreach for the Gerald Desmond Bridge replacement project for the Port of Long Beach; and other transportation projects including RCTC's State Route 91 project and SBCTA's Interstate 10 and I-15 Corridor projects.

#### Staffing and Project Organization

The three firms proposed project teams with relevant experience in delivering community outreach programs on various transportation-related projects.

TRC's proposed project manager has more than 25 years of experience related to public outreach, as well as large-scale public involvement programs for public agencies, and currently serves as project manager for RCTC's I-15 Express Lanes design-build project. The proposed community liaison has more than 12 years of public relations experience and assisted in the development and implementation of the public outreach program for the design/build I-15 Express

Lanes project. During the interview, the project team members discussed their roles and approach for conducting outreach and responded to the evaluation committee's questions. TRC proposed 6,441 hours during the six-year project, which is 26 percent more hours than other proposals and proposed the highest level of commitment for the project at 55 percent availability for the project manager and 85 percent availability for the community liaison.

Comm Lab's proposed project manager has 19 years of public affairs experience and is the current project manager for OCTA's I-5 South County Improvement Project's final design phase and TCA's Tesoro extension of the SR-241. The community liaison has more than ten years of experience in public affairs. The project team members discussed their approach and strategies, as well as responded to the evaluation committee's questions during the interview. Comm Lab proposed 5,100 hours during six years, with the project manager's availability of 25 percent and the community liaison's availability of 40 percent.

Westbound's proposed project manager has 18 years of experience in public outreach and marketing. 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. During the interview, the project team discussed their approach and responded to the evaluation committee's questions regarding the ability of one team handling multiple projects. Westbound proposed 5,083 hours during six years, with 35 percent availability for the project manager and 40 percent availability for the community liaison.

#### Work Plan

TRC presented a comprehensive work plan that included both traditional and innovative outreach tools to reach wider audiences. The firm provided examples of communication and outreach tools, including web-based social media platforms to efficiently disseminate project information among large groups of listeners. TRC identified major stakeholders and summarized feedback received from cities regarding preferences and concerns for communicating with communities. TRC's proposed enhancements and innovations include using Facebook's user profiles to directly target specific audiences and electronic communications, such as e-notices, featuring project images, infographics or video clips. To enhance motorist communications during construction, TRC proposed using WAZE Connected Citizens Program, a navigation tool that provides real-time information for more informed trip planning and driving decisions.

Comm LAB is familiar with the project, having performed public outreach during the environmental and design phases. Comm LAB discussed the elements of its outreach plan for this project with various strategies, such as open houses, community coffees, neighborhood meetups, information booths, video productions posted on OCTA's website, and through social media and community stakeholder meetings. The firm's social media platforms include Facebook, Twitter, Instagram, and NextDoor to communicate effectively with stakeholders in specific geographic locations and will use WAZE to ensure timely information. The firm discussed using Smartsheet for project management to keep the outreach program on time and on budget. Comm LAB identified special issues and challenges, and offered project innovations that included a video program so that residents, stakeholders, and commuters can see the impact of construction before traveling the corridor, and working with Augmented Reality, a technology that superimposes a computer-generated image providing a composite view.

Westbound proposed a comprehensive work plan approach, which included project management, contract administration and public outreach/communication elements. To drive strategic public outreach efforts, Westbound proposed their dedicated action and response team outreach approach, specialized teams to address specific audience needs. The firm would also utilize a cloud-based project and database management system called Smartsheet that enables real-time development, implementation, and monitoring of all collaboration and work tasks. The proposed enhancements and technical innovations included text messaging or voice broadcasts with construction, closures, and potential impacts on traffic, and Earthcam video cameras for access to a live-feed of real-time progress on construction and traffic conditions.

#### **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 rates based on their relation to the lowest weighted average hourly rate. TRC proposed the lowest weighted average hourly rate among the short-listed firms. TRC also proposed the highest number of project hours to complete the scope of work.

#### 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 TRC as the top-ranked firm to provide public communications and community outreach for the I-5 Improvement Project from SR-73 to El Toro Road. Each firm also proposed similar pricing of other direct expenses as part of the overall maximum obligation.

#### Fiscal Impact

The freeway capital projects were approved in OCTA's 2018-2019 Budget, External Affairs. The project is funded by a combination of federal, state, and local Measure M2 funds.

#### **Summary**

Based on the information provided, staff recommends the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-8-2086 between the Orange County Transportation Authority and TRC Solutions, Inc., in the amount of \$771,410, for a six-year term to develop and provide comprehensive public communications and community outreach for the I-5 Improvement Project from SR-73 to El Toro Road.



***Attachments***

- A. Review of Proposals, RFP 8-2086 Public Communications and Community Outreach for the Interstate 5 Improvement Project from State Route 73 to El Toro Road
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 8-2086 Public Communications and Community Outreach for the Interstate 5 Improvement Project from State Route 73 to El Toro Road
- C. Contract History for the Past Two Years, RFP 8-2086 Public Communications and Community Outreach for the Interstate 5 Improvement Project from State Route 73 to El Toro Road

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