




November 4, 2019

To: Regional Planning and Highways Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Consultant Selection for the Safe Travels Education Program Campaign

Overview

Consultant services are required to develop the Safe Travels Education Program campaign. In collaboration with the Orange County Health Care Agency, the project aims to improve safety by hosting education and encouragement activities at 25 public elementary schools serving disadvantaged communities in Orange County. Proposals have been received and evaluated in accordance with the Orange County Transportation Authority's procurement procedures for professional and technical services. Board of Directors' approval is requested for the selection of a firm to perform the required work.

Recommendations

- A. Approve the selection of Alta Planning + Design as the firm to develop the Safe Travels Education Program.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1433 between the Orange County Transportation Authority and Alta Planning + Design, in the amount of \$500,000, to develop the Safe Travels Education Program Campaign for a two-year term.

Discussion

The Safe Travels Education Program (STEP) campaign will engage with local city staff and police departments to successfully promote and leverage the education and encouragement activities for walking and biking. A range of STEP activities will be offered based on local interest and time availability for school assemblies, walk/bike to school day events, and training activities directed to both students during and after school, as well as families on nights or weekends. The STEP will also strengthen partnerships with transportation,

health, and public safety officials, and empower schools to continue Safe Routes to School (SRTS) efforts following the project.

The Orange County Transportation Authority (OCTA) will partner with the Orange County Health Care Agency (OCHCA) to administer the STEP campaign. The project funding will be offered at 25 public elementary schools in Orange County serving state-designated disadvantaged communities and where growth in SRTS activities is desired. This project will provide instruction to youth at an early age directly from expert staff with participation by local police representatives and establish safe travel patterns.

A California Transportation Commission (CTC) Active Transportation Program (ATP) grant was secured for \$500,000 to implement the project. The grant is fully funded, and collaboration with the California Department of Transportation and OCHCA is planned.

Procurement Approach

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

On July 22, 2019, Request for Proposals (RFP) No. 9-1433 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on July 18 and 22, 2019. A pre-proposal conference was held on July 29, 2019, with eight attendees representing six firms. Three addenda were issued to make available the pre-proposal conference registration sheets, provide responses to questions received, and make clarifications relative to the RFP.

On September 4, 2019, five proposals were received. An evaluation committee comprised of OCTA staff from Contracts Administration and Materials Management, Strategic Planning, Rideshare Marketing, as well as an external representative from OCHCA met to review the submitted proposals.

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

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|-------------------------------------|------------|
| • Staffing and Project Organization | 35 percent |
| • Qualifications of the Firm | 25 percent |
| • Work Plan | 20 percent |
| • Cost and Price | 20 percent |

Several factors were considered in developing the evaluation criteria weights. Staffing and project organization was weighted the highest as the qualifications of the project manager and other key personnel are very important to the successful and timely delivery of the project, and qualifications of the firm was weighted high to evaluate the firm's experience in performing work of a similar scope and size. Equally weighted were the work plan, as well as cost and price criteria, to emphasize the importance of the team's understanding of the project, its challenges, and its approach to implementing the various elements of the scope of work. The technical approach to the project is critical to the successful performance of the project. Cost and price ensure OCTA receives value for the services provided.

The evaluation committee reviewed and discussed all proposals received based on the evaluation criteria and short-listed two firms to be interviewed. The two most qualified firms are listed below in alphabetical order:

Firm and Location

Alta Planning + Design (Alta Planning)
Los Angeles, California

Safe Moves
Van Nuys, California

On September 25, 2019, the evaluation committee interviewed the two short-listed firms. The interviews consisted of a presentation allowing each team to present its qualifications, highlight its proposal, and respond to evaluation committee questions. Questions were asked relative to the proposed project team's experience in securing commitment from schools and law enforcement, how their approach could sustain progress, and on-going momentum concerning stakeholders' SRTS programs, as well as developing metrics to evaluate success of the project.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and made adjustments to the scores. The rankings did not change.

Based on the evaluation of written proposals and interviews, staff recommends Alta Planning as the firm to develop the STEP campaign. The following is a summary of the proposal evaluation results.

Qualifications of the Firm

The two short-listed firms are established firms with relevant experience and extensive resources. The firms demonstrated experience in the development of similar SRTS activities.

Alta Planning was founded in 1996, and has experience working on SRTS at the local and national levels promoting safe and convenient ways for children and families to get to and from schools. Alta Planning has nearly two decades of SRTS-related experience assisting schools, school districts, and other jurisdictions to identify SRTS campaigns that best serve communities. The firm has completed similar SRTS non-infrastructure activities, which includes citywide programs for the City of Rialto, a community engagement process for the City of Santa Ana, and created a menu of potential education activities for elementary school principals for the City of Anaheim's three SRTS projects. The firm also assisted the East Central Wisconsin Regional Planning Commission with communications and public relations to promote their regional SRTS Program.

Safe Moves is a non-profit organization established in 1983 and has planned and executed comprehensive SRTS programs at state, county, and city levels. The firm recently developed a number of SRTS programs that increased walking and bicycling in California cities that include Long Beach, Mountain View, and Stockton. The firm also has experience working with school districts, governmental departments, law enforcement, and city councils conducting SRTS programs.

Staffing and Project Organization

The firms proposed qualified project managers and key personnel with relevant experience.

Alta Planning proposed an experienced team that includes a principal-in-charge with over 13 years experience collaborating with communities on SRTS projects. The principal-in-charge is currently involved with the Oregon Department of Transportation SRTS, Alameda SRTS, and San Bernardino County SRTS programs. The proposed project manager has ten years of experience working on SRTS projects and is currently working on the Oceanside SRTS, San Bernardino County SRTS, and Solano County SRTS programs.

The assistant project manager has worked on various SRTS projects as well, including the Irvine Citywide Safety Plan, OCTA Partnerships with Police Project, and the Riverside Active Transportation Plan. During the interview, the firm demonstrated the team's expertise and understanding in the development of STEP campaigns.

Safe Moves' proposed project manager has worked in SRTS for 36 years on projects including the Los Angeles Department of Transportation, Santa Clara SRTS, Alameda Public Works SRTS, Fremont SRTS, and others. The program coordinator has over three years of experience specializing in program coordination for SRTS on projects, such as Alameda Public Works SRTS, Palo Alto SRTS, Glendale SRTS, and others. The project manager described the firm's involvement in SRTS programs at the interviews and spoke of the firm's approach to implementing a successful STEP.

Work Plan

Both firms met the requirements of the RFP and effectively discussed the approach to completing the STEP identified in the scope of services.

Alta Planning presented a work plan that detailed their project understanding and approach. The firm discussed identifying backup schools in case one of the initially identified 25 schools is unable to continue with the program. The proposal discussed both short-term and long-term strategies with a six-step program showcasing the firm's vision for successful implementation of the STEP campaign. The work plan demonstrated an understanding of the project objectives and clearly described how to strengthen partnerships with transportation, health, and public safety officials, and empowering school champions to continue SRTS efforts following the project. During the interview, the firm elaborated on a few of the planned activities, such as bike rodeos, family bike events, bicycle or pedestrian safety education, and after-school safety education, and provided examples of where the approach was used in the past. As required by the grant, the firm will use the Orange County Conservation Corps (OCCC) to provide staff support at STEP engagement events, such as walking school bus events and school campus bike rodeos.

Safe Moves' work plan demonstrated understanding of the project objectives, and the firm presented a detailed approach to completing the work as outlined in their summary of each task. The firm's work plan addressed each task but was general in the overall project approach. Safe Moves proposes conducting interactive hands-on pedestrian and bicycle safety events utilizing a simulated city-course called "Safe Moves City." As required by the grant, the firm plans to use OCCC to assist working with students on educational and encouragement activities.

Cost and Price

Pricing scores were based on a formula which assigned the highest score to the lowest firm-fixed price for the two-year term and scored the other proposals' firm-fixed price based on their relation to the lowest firm-fixed price. Although Alta Planning's proposed firm-fixed price was not the lowest, it was within the independent cost estimate.

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 Alta Planning as the top-ranked firm to develop the STEP campaign. Alta Planning submitted a comprehensive proposal that was responsive to all requirements of the RFP and, in the interview, the firm further highlighted Alta Planning's qualifications, staffing experience, and technical approach to the work plan.

Fiscal Impact

The project is included in the approved fiscal year 2019-20 budget for the Planning Division (Account No. 1531-7519-A4530-0QB). The CTC ATP Grant Program is funding 100 percent of the project.

Summary

Based on the information provided, staff recommends the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-9-1433 with Alta Planning, in the amount of \$500,000, for consultant services to develop the STEP campaign for a two-year term.

Attachments

- A. Review of Proposals, RFP 9-1433 Safe Travels Education Program Campaign
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 9-1433 Safe Travels Education Program Campaign
- C. Contract History for the Past Two Years, RFP 9-1433 Safe Travels Education Program Campaign

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