



**June 18, 2020**

**To:** Legislative and Communications Committee

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

**Subject:** Agreement for Printing, Packaging, and Delivery of the Bus Book

### **Overview**

The Orange County Transportation Authority provides the public with bus service information to the public through a variety of means including the printed bus book, which is updated for each major service change with new maps, schedules, and other essential information. Consultant services are used to provide printing, packaging, and delivery of bus books for bus service changes. The current contract will expire on August 31, 2020. Board of Directors' approval is requested to execute an agreement to continue providing printing, packaging, and delivery of bus books in support of bus service change communications.

### **Recommendations**

- A. Approve the selection of Southwest Offset Printing Co., Inc. as the firm to provide printing, packaging, and delivery of bus books in support of bus service change communications.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2198 between the Orange County Transportation Authority and Southwest Offset Printing Co., Inc., in the amount of \$180,000, for a three-year initial term with two, two-year option terms, to provide printing, packaging, and delivery of bus books in support of bus service change communications, on an as-needed basis.

### **Discussion**

The Orange County Transportation Authority (OCTA) operates fixed-route bus service, OC ACCESS service for people unable to use traditional fixed-routes, OC Flex on-demand service, and provides funding for Metrolink commuter rail service to serve Orange County's residents and commuters. OCTA provides the public with bus service information through a variety of means, including the printed bus book, a comprehensive booklet, and other customer

communications. While the volume of printed bus books has declined over the years due to the availability of information on OCTA's website and third-party apps, printed bus books are made available to those who cannot readily access the internet or prefer a hard copy.

The bus book is revised with new maps, schedules, and other essential information when the fixed-route system undergoes each of the three (3) planned major service changes per year, occurring in February, June, and October. Additional important information contained in the bus book includes how to ride and purchase a pass, as well as connecting service schedules, including Metrolink, iShuttle, and neighboring county and city bus route maps and schedules. With each service change, updated bus books are printed, distributed, and sold on-board the bus and at the OCTA Store priced at \$1.00 per booklet to mitigate waste. While sales aboard buses are currently suspended due to the novel coronavirus (COVID-19), sales will resume once it is safe to do so.

During the past couple of years, print quantities have been reduced from 60,000 to 35,000 bus books per service change. Based on the downward trend in demand for printed bus books, the planned print quantity for bus books in fiscal year 2020-21 is up to 30,000 units per service change, with actual print quantities driven by bus service levels and ridership demand. New bus books will not be printed for the June 2020 service change due to COVID-19, but will be available to download from OCTA's website.

The print quantities and the number of pages in the bus book are outside of the capability of the OCTA internal print shop. The assistance of an outside printing firm is required to print, stitch, package, and deliver the bus book three times a year before each planned major service change.

OCTA's current contract for bus book printing, packaging, and delivery services is set to expire on August 31, 2020. A new service provider is required to continue to print and deliver the bus book in support of OCTA's three bus service changes.

Historically, OCTA has held shorter-term contracts for these services; however, it was determined that the bus book printing program will benefit from a longer engagement as it will allow a consistent workflow and potential cost savings from higher print volume commitments resulting from a multiyear 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 19, 2020, Request for Proposals (RFP) 0-2198 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on March 22 and 28, 2020. No addenda were issued.

On April 15, 2020, three proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Marketing and Customer Engagement, General Services, as well as Scheduling and Bus Operations Support departments met to review all proposals.

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

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

The standard 25 percent for each criterion was used for this procurement. All criteria are equally important as the firm needed to demonstrate its qualifications through proven experience and knowledge of delivering similar bus book printing projects. Staffing and project organization was important as the firm had to propose a project team with the expertise and skills to provide technical guidance and oversight of successful project delivery. Work plan was also weighted at 25 percent as the firm had to demonstrate its understanding of the scope of work and its deliverables. Finally, cost was weighted at 25 percent to ensure OCTA receives value for the services provided.

On April 29, 2020, 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

Southwest Offset Printing Co., Inc. (Southwest)  
Gardena, California

The PM Group, Inc. (PMG)  
Lake Forest, California

On May 6, 2020, the evaluation committee conducted interviews with both short-listed firms. The interview consisted of a presentation to demonstrate the firms' understanding of OCTA's requirements. 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, similar projects, staff responsibilities, and quality control measures. In addition, each team was asked specific clarification questions related to its proposal.

At the conclusion of the interview, both firms were requested to submit a best and final offer (BAFO). The BAFO requested the firms to provide more competitive fully-burdened firm-fixed unit prices. Both firms made adjustments to their proposed pricing, which resulted in overall lower costs.

After considering the responses to the questions asked during the interviews and the BAFO, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores. However, Southwest remained the top-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 Southwest for consideration of the award. The following is a brief summary of the proposal evaluation results.

**Qualifications of the Firm**

Southwest was founded in 1988 in Gardena, California. The firm provided a detailed equipment list with specifications. Southwest demonstrated relevant experience in the printing industry with work on projects similar to the scope of work. The firm did not propose to utilize any subcontractors. Current existing customers include; USA Today, The Daily News, Long Beach Press Telegram, Hollywood Reporter and public entities including OCTA, OmniTrans, and the City of Gardena. Southwest's facilities are operational 24/7, 365 days a year, and has over 350,000 square feet of printing space.

PMG is a print management firm founded in 1996 and is based in Lake Forest, California. The firm has experience working with government entities, cities, municipalities and agencies including Orange County Fire Authority, Los Angeles Unified School District, and the City of Garden Grove. The firm does not have experience providing direct printing services as required; however, PMG elaborated in their interview that the firm acts as a manufacturer representative to approximately six to eight shops and outsources work to each shop. PMG's proposal was unclear on the use of subcontractors and during the interview; the firm was unable to explain the relationship with the manufacturers identified in the proposal who would perform the physical printing, packaging, and delivery of bus books.

#### **Staffing and Project Organization**

Southwest proposed a knowledgeable project team with experience working on projects including OCTA's current bus books. The proposed project manager has 25 years of experience working in the graphic arts industry. The proposed supporting key staff have a combined 40 years of experience in the printing industry. The firm's proposed staffing plan demonstrated availability for support and oversight of OCTA's printing needs. The project team's experience includes graphic arts, printing, project management, accounting, sales, customer service, scheduling, production, and logistics. The project team's resumes and organizational chart detailed the staff allocation for the project. During their interview, the firm discussed staff roles and responsibilities, as well as explained staff background and experience with the company.

PMG proposed a knowledgeable staff for bus book printing. The proposed project manager is the president of PMG and has 35 years of experience in the printing industry. The proposed supporting key staff have a combined 80 years of printing industry experience. During the interview, the firm discussed the roles and responsibilities of staff. However, PMG stated that the printing work would be outsourced to manufacturers with individuals who were not identified in the proposal.

#### **Work Plan**

Southwest presented a work plan that addressed all elements of the scope of work. The firm discussed its approach to managing print requests from project scheduling and proof approval, to plate production and shipping and delivery. Southwest indicated that it will leverage its knowledge of OCTA and past bus book projects to refine workflow and improve delivery of products. The firm discussed the technical specifications for the print, package, and delivery of bus

books and use of equipment with specifications. The firm expanded on its approach during the interview and provided an outline for activities including production planning, proofing, pre-press, pre-bindery planning, and deliveries. Southwest described its quality control process that 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. During the interview, the firm provided more detailed descriptions of the equipment that will be used.

PMG provided a day-to-day plan for print package and delivery of bus books. The firm discussed its approach to implementing quality control measures to ensure successful delivery of bus books. The firm emphasized proofing and budget controls for completion of deliverables. The firm detailed the delivery of bus books to OCTA locations, as well as housing the balance of bus books for OCTA. While PMG provided detail into its ability to deliver the orders, the firm was not able to provide details of the manufacturing processes, since those processes vary depending on the manufacturer that is utilized for a specific print job.

#### **Cost and Price**

Pricing scores were based on a formula which assigned the highest score to the firm with the lowest average firm-fixed unit price per bus book and scored the other proposals' average firm-fixed unit price on their relation to the lowest average firm-fixed unit price. Southwest proposed the second lowest average firm-fixed unit price among the proposing firms.

#### **Procurement Summary**

Based on the evaluation of written proposals, the firm's qualifications, as well as information obtained from the interviews and BAFO, the evaluation committee recommends the selection of Southwest Offset Printing Co., Inc. as the top-ranked firm to print, package, and deliver bus books. Southwest delivered a thorough and comprehensive proposal and an interview that was responsive to all requirements of the RFP.

#### **Fiscal Impact**

Bus Book Printing, Packaging, and Delivery services are included in OCTA's Fiscal Year 2020-21 Budget, External Affairs, Marketing,

Account No. 1837-7519-A3311-1G1, and will be funded through the Orange County Transit District Fund 30.

***Summary***

Staff is recommending the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2198 between the Orange County Transportation Authority and Southwest Offset Printing Co., Inc., in the amount of \$180,000 for a three-year initial term with two, two-year option terms, to provide bus book printing, packaging, and delivery services in support of bus service changes.

***Attachments***

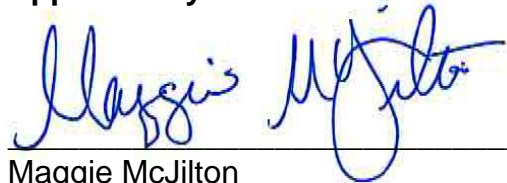
- A. Review of Proposals RFP 0-2198 Print, Package and Deliver Bus Book
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms) RFP 0-2198 Print, Package and Deliver Bus Book
- C. Contract History for the Past Two Years, RFP 0-2198 Print, Package, and Deliver Bus Book

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