



October 15, 2020

To: Legislative and Communications Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Agreement for Rideshare and Vanpool Marketing, Design, and Advertising Services

Overview

On July 8, 2020, the Orange County Transportation Authority released a request for proposals for consultant support for rideshare and vanpool marketing, design, and advertising services. Proposals were received in accordance with Orange County Transportation Authority procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for rideshare and vanpool marketing, design, and advertising services.

Recommendations

- A. Approve the selection of Brown Marketing Strategies, Inc. to provide rideshare and vanpool marketing, design, and advertising services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2206 between the Orange County Transportation Authority and Brown Marketing Strategies, Inc. in the amount of \$570,000, to provide rideshare and vanpool marketing, design, and advertising services for a two-year term, with a one-year option term.

Discussion

The Orange County Transportation Authority (OCTA) provides and manages rideshare and vanpool programs to encourage businesses and commuters to utilize convenient and cost-effective transportation options. The rideshare program promotes transportation alternatives, including bus, train, vanpool, carpool, telework, and active transportation. OCTA's vanpool program is a public-private partnership that provides vanpools to commuters throughout Southern California who work in Orange County. OCTA provides marketing and outreach for the vanpool program in an effort to sustain and grow the number of vanpools and miles reported. In addition, OCTA conducts rideshare marketing

and outreach campaigns that help employers comply with the South Coast Air Quality Management District's Rule 2202 - On-Road Motor Vehicle Mitigation Options, which provides employers of 250 or more employees with a number of options to reduce mobile-source emissions generated from employee commutes to comply with federal and state Clean Air Act requirements.

OCTA's rideshare programs and services include the following:

- Perk Pass – discounted bus passes for employers
- Average Vehicle Ridership survey calculation and data analysis
- Metrolink's Corporate Pass Program – discounted passes for employers
- Guaranteed Ride Home– provides employees who rideshare the opportunity to reimburse the cost of an emergency trip home
- Vanpool Program – promotes commuting as a group in a shared vehicle
- Employer outreach to encourage rideshare program participation
- Employer marketing training workshops and network meetings
- Marketing campaigns for Rideshare Week, Bike to Work Week, and Dump the Pump Day
- Ride matching and vanpool formation services
- Rule 2202 compliance assistance

With consultant support, OCTA conducts marketing campaigns, promotions, and outreach to achieve the following goals:

- Increase awareness of OCTA's rideshare programs and services
- Stimulate use of alternative transportation modes and encourage telework programs
- Grow ridesharing participation by commuters and employers
- Expand the vanpool program participation

To assist with the development and implementation of these strategies, OCTA requires consultant support to provide various marketing services to conduct marketing campaigns and promotions. Services include:

- Integrated strategic marketing plan development and campaign development
- Email, social media, and mobile marketing
- Digital and traditional media planning, buying, and optimization
- Diversity marketing and translation services
- Print and digital creative development, including website development, video production, and photography

- Market research
- Production and printing services

Historically, OCTA has held separate contracts for rideshare and vanpool marketing services; however, it was determined that the programs would be better served by having one consultant manage the marketing efforts since both programs have similar objectives. Furthermore, it was determined that these marketing programs would benefit from a more extended engagement as it will allow for cohesive messaging and potential cost savings from a multiyear agreement.

Procurement Approach

This procurement was handled in accordance with OCTA Board of Directors (Board)-approved procedures for professional and technical services. In addition to cost, many other factors are considered in an award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering factors such as project organization and staffing, prior experience with similar projects, work plan, and a fair and reasonable price structure.

On July 8, 2020, Request for Proposals (RFP) 0-2206 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on July 9 and 13, 2020. A pre-proposal conference was held on July 14, 2020 with six attendees representing six firms. Two addenda were issued to provide a copy of the pre-proposal registration sheet and to respond to questions related to the RFP.

On July 28, 2020, six proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Marketing and Customer Engagement, Public Outreach, as well as Planning and Analysis departments met to review all proposals received. The proposals were evaluated based on the following evaluation criteria and weightings.

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| • Qualifications of the Firm | 30 percent |
| • Staffing and Project Organization | 20 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 30 percent to emphasize the importance of the proposing firms having qualifications and past experience on similar projects. Staffing and project organization was weighted at 20 percent to ensure the knowledge, skills, and abilities needed to perform the services required in the scope of work are met. Work plan was also weighted at 30 percent as the firms needed to demonstrate a thorough understanding of the work required and the methods needed to deliver successful results for the highly-specific and niche nature of the work required. Cost and price were weighted at 20 percent to ensure the services would be provided at competitive rates.

On August 11, 2020, the evaluation committee reviewed and discussed the six proposals received based on the evaluation criteria, and two firms were shortlisted and interviewed. The two firms are listed in alphabetical order as follows:

Firms and Location:

Brown Marketing Strategies, Inc. (BMS)
San Diego, California

Celtis Ventures, Inc. (Celtis)
Redondo Beach, California

The interviews with the two short-listed firms were conducted on August 18, 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 qualifications and respond to evaluation committee questions. Questions were asked relative to the qualifications and experience of the proposed project team's key personnel, innovative ideas for rideshare and vanpool marketing, and the firm's approach to the work plan considering the continuously changing physical and social landscape as a result of the coronavirus (COVID-19) pandemic.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and made adjustments to the scores. However, BMS remained the higher-ranked firm with the higher overall score.

Based on the evaluation of written proposals and interviews, staff recommends BMS as the firm to provide rideshare and vanpool marketing, design, and advertising services. The following is a summary of the proposal evaluation results.

Qualifications of the Firm

BMS is a Disadvantaged Business Enterprise firm founded in 2007 with nine full-time staff members and two part-time staff members. The firm has demonstrated direct relevant experience and capabilities in all aspects of the services requested. The firm has provided similar services collaborating on rideshare week with other transit agencies such as Rapid San Diego, media buying and placement for new routes for Metropolitan Transit System, promoting customer retention programs and initiatives for North County Transit District, and worked with San Diego Association of Governments (SANDAG) for iCommute rideshare and vanpool services, as well as media buying and creative implementation for both the County of San Diego COVID-19 campaign and Orange County Health Care Agency.

Celtis was established in 2012 and employs 16 full-time staff and two part-time staff members. The firm has experience working with many transportation agencies and specifically provided marketing services for rideshare and vanpool campaigns for the Ventura County Transportation Commission (VCTC), the Livermore Amador Valley Transit Authority and the Riverside County Transportation Commission, which resulted in increased participation for all three agencies. The firm also promoted a ridership campaign for OCTA's OC Bus, which helped to increase ridership and system redesign for OC Bus. In addition, the firm has also created vanpool programs for the City of Los Angeles and the State of Texas.

Staffing and Project Organization

BMS' proposed creative director/account manager and other key personnel are all qualified and demonstrate knowledge of the program requirements. The proposed project staff for the firm demonstrated familiarity essential to the scope of work demonstrating expertise in marketing, advertising, and design skills and have worked for the firm ranging from two to 12 years. The creative director brings almost 30 years of experience in the advertising field and creative strategy and is currently the project manager for the SANDAG vanpool and rideshare project. The art director has over ten years' experience in project management and creative strategy. During the interview, the team was responsive and offered proficiency and insight with every response.

Celtis proposed a team with experience and qualified backgrounds suitable to performing the requirements of the scope of work. Celtis' proposed creative director/account manager has 20 years marketing and outreach experience and is the current project manager for VCTC's comprehensive communications. The art director has more than 15 years of experience in graphic design. The project team members discussed their approach and strategies, as well as responded to the evaluation committee's questions during the interview.

Work Plan

The work plan proposed by BMS conformed to the scope of work identified in the RFP and outlined the activities that would be undertaken in completing the services. The firm, through their proposal, also demonstrated their ability to provide the proper tools and mechanisms to see the process from beginning to end and provided details of the firms' approach to providing a strategic marketing plan development for campaigns. The firm demonstrated details on how they have achieved ridership growth with agencies like SANDAG and identified how transit markets need to identify and attract a diverse customer base of prospective commuters through the use of social media tactics and display events. The firm recommended new ideas like the employer recognition program that praises Orange County employers for their efforts in encouraging their employees to make alternative commute choices. During the interview, the firm provided information, which demonstrated they are looking at ways to anticipate disruptions associated with COVID-19 using virtual outreach and webinars with virtual ambassadors and also discussed ways to make the rideshare and vanpool program more exciting and desirable.

The work plan proposed by Celtis was complete and comprehensive addressing the requirements of the scope of work and the firm demonstrated understanding of rideshare and vanpool programs. Celtis recommends OCTA take advantage of available technology and become more digital in rideshare marketing. The firm stressed the importance of strategic planning for each project and provided ideas to mitigate the impacts of COVID-19, such as virtual training sessions where people can have access to Orange County rideshare information regarding safety guidelines. The firm was not specific in responses to certain interview questions.

Cost and Price

Pricing scores were based on a formula which assigned the highest score to the firm with the lowest average hourly rate and scored the other proposals' average hourly rates based on their relation to the lowest average hourly rate. BMS'

proposed average hourly rate was lower than Celtis and was competitive based on proposed rates with other firms.

Procurement Summary

Based on the evaluation of the written proposal, the firm's qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of BMS as the top-ranked firm to provide rideshare and vanpool marketing, design, and advertising services. BMS delivered a thorough and comprehensive proposal and an interview that was responsive to requirements of the RFP.

Fiscal Impact

The project is included in OCTA's Fiscal Year 2020-21 budget. The program is funded with Congestion Mitigation and Air Quality grant funds in External Affairs Division Account No. 1841-7519-A2237-L75.

Summary

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2206 between the Orange County Transportation Authority and Brown Marketing Strategies, Inc., in the amount of \$570,000, for a two-year term, with a one-year option term for the Orange County Transportation Authority's rideshare and vanpool marketing, design, and advertising services.

Attachments

- A. Review of Proposals, RFP 0-2206 Rideshare and Vanpool Marketing, Design, and Advertising Services
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 0-2206 Rideshare and Vanpool Marketing, Design, and Advertising Services
- C. Contract History for the Past Two Years, RFP 0-2206 Rideshare and Vanpool Marketing, Design, and Advertising Services

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