



November 19, 2020

To: Legislative and Communications Committee
From: Darrell E. Johnson, Chief Executive Officer
Subject: Agreement for Website Maintenance Support Services

Overview

On August 25, 2020, the Orange County Transportation Authority released a request for proposals for website maintenance support services. 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 for website maintenance support services.

Recommendations

- A. Approve the selection of Web Advanced as the firm to provide website maintenance support services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2524 between the Orange County Transportation Authority and Web Advanced in the amount of \$900,000, for a four-year initial term with one, three-year option term, to provide website maintenance support services.

Discussion

As the Orange County Transportation Authority (OCTA) develops and delivers transportation solutions to keep Orange County moving and enhance the quality of life of residents and commuters, OCTA's website, OCTA.net, serves as the public face for all of OCTA's projects, programs, and services. A critical communication tool and information hub, the OCTA.net website informs the public about OCTA's various initiatives, is the start of the customer journey for transit riders, provides an essential resource for communities during capital construction projects, and serves as the conduit for marketing and communication campaigns to increase public awareness and interest in riding public transportation.

With consultant support, OCTA performs ongoing website maintenance and evaluates and implements changing technologies that can enhance the user experience, navigation, accessibility, and website security, as well as ensure compliance with local, state, and federal laws. OCTA.net contains more than 1,000 webpages and over 5,000 digital and creative assets that are reviewed, maintained, and updated.

To assist with the maintenance of the website, OCTA requires consultant support to provide various technical services including:

- General, administrative, and developmental support for the Ektron content management system (CMS) that powers the OCTA.net website and related server applications.
- Reporting on and evaluating website performance metrics, identifying opportunities, and implementing solutions that aim to enhance the website user experience and overall customer satisfaction.
- Improving the organic visibility of OCTA.net within key search engine platforms such as Google and Bing.
- Ensuring a seamless digital experience for website visitors, including integration between the OCTA.net website and other digital marketing and communications channels, such as social media, digital advertising, and existing mobile applications.
- Providing support to OCTA staff for technical emergencies that occur outside of business operating hours when required.

These technical services are currently being provided through a contract that is set to expire on November 30, 2020, and a new contract is necessary to provide continued support. Historically, OCTA has held shorter-term contracts for these services; however, it was determined that the website maintenance support services contract will benefit from a longer engagement as it will allow for more efficient technology implementations and potential cost savings 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 August 25, 2020, Request for Proposals (RFP) 0-2524 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on August 25 and September 1, 2020. A pre-proposal conference was held on September 2, 2020, with ten attendees representing six firms. Three addenda were issued to make available the pre-proposal conference registration sheet and presentation, provide responses to written questions, as well as handle administrative issues related to the RFP.

On September 17, 2020, nine proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Marketing and Customer Engagement, Information Systems, and Public Outreach departments, as well as external evaluators from Metrolink and OCTA's contracted information technology technical consultant, Intratek Computer, Inc., met to review all the 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 | 30 percent |
| • Work Plan | 20 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 as the firm had to demonstrate direct experience maintaining highly technical website projects, as well as experience utilizing the Ektron CMS, which powers the OCTA website. Staffing and project organization was also weighted at 30 percent as the firm had to present an experienced, diverse project team with a strong technical background. Work plan was weighted at 20 percent as the firm had to demonstrate its ability to maintain an existing website with established technology and processes. The firm also had to present its approach to meeting the various support services identified in the scope of work. Cost was also weighted at 20 percent to ensure that the website maintenance support services are delivered efficiently and that OCTA receives value for the services provided.

On October 1, 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

Fortuitas, Inc. (Fortuitas)
Valencia, California

Web Advanced
Irvine, California

On October 8, 2020, the evaluation committee conducted interviews with the short-listed firms. The interview consisted of a presentation by each firm to demonstrate the firms' understanding of OCTA's requirements. The firms' project managers and key team members had an opportunity to present each team's qualifications and respond to the evaluation committee's questions. Questions were related to custom development requests, implementing accessibility best practices, enhancing the user experience, generating site traffic, experience with the Ektron CMS as this is currently utilized by OCTA, migrating to a new CMS, as well as specific clarification questions related to each firm's proposal.

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

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

Qualifications of the Firm

Web Advanced was incorporated in 2000 and is located in the City of Irvine. The firm has 14 full-time employees, as well as three full-time and eight part-time contractors. The firm has over eight years of experience with the Ektron CMS, which is the current CMS for the OCTA website, and demonstrated experience providing website development and maintenance support services to its clients, such as Metrolink, OCTA, Rio Metro Regional Transit District, and the Transportation Corridor Agencies, utilizing the Ektron CMS and other related technologies. In addition to currently providing website maintenance support services, the firm's work with OCTA includes redesigning OCTA.net, as well as developing microsites to inform the public about various projects and programs. Web Advanced proposed to continue its partnership with the same subcontractors for specialized digital services, and they are proposed to provide

digital strategy, branding, and other digital marketing-related services, as well as web-based video production as required by the scope of work.

Fortuitas was established in 2006. The firm has 20 employees with offices in the cities of Valencia and Austin, Texas. The firm became an Ektron-authorized partner in 2009. Fortuitas discussed its experience providing website support and maintenance services to the California Department of Wildlife, First Premier Bank, as well as The New School, which utilizes the Ektron CMS. Fortuitas proposed a subcontractor to provide additional technical support and Ektron expertise. During the interview, it was clarified that the proposed subcontractor had worked on The New School website and Fortuitas was not involved in the project. The other referenced projects in the proposal were not Ektron-related.

Staffing and Project Organization

Web Advanced proposed a project team with relevant experience and includes many of the same individuals currently providing website services to OCTA. The proposed project manager has been with Web Advanced for seven years serving as a project manager on various projects. The project team demonstrated Ektron experience and includes the co-founder and Chief Creative Officer of Web Advanced, the Chief Technology Officer, who has been with the firm for 20 years, as well as the creative designers and web developers. The project team also includes additional support staff. During the interview, the project team discussed their roles and approach to providing website maintenance support services, as well as responded to the evaluation committee's questions, which demonstrated the project team's overall experience and understanding of OCTA's website needs.

Fortuitas proposed a project team with website development experience. The project manager has over 16 years of experience and has been with the firm for six months. The proposed subcontractor's Technical Director has been with the firm for one year and has over ten years of experience including one year of Ektron experience. The project team includes the proposed subcontractor's senior developer who had previously worked with Ektron for ten years, as well as Ektron specialists. The project team discussed their roles and approach to providing website maintenance support services during the interview. The firm's responses to the evaluation committee's questions demonstrated the project team's knowledge and experience with the Ektron CMS.

Work Plan

Web Advanced presented a detailed work plan that demonstrated an understanding of the scope of work. The firm described its approach and strategies related to user-experience testing and technology audits, content creation and integration, accessibility compliance, and website security. Web Advanced discussed upgrading the CMS and developing custom solutions. The firm described its process for on-call digital services, which can be streamlined and accelerated to meet any urgent, same-day delivery requests. Web Advanced proposed to provide 24/7 support to ensure zero downtime on the website, which includes a full alerting system that notifies Web Advanced of any downtime without OCTA's involvement. The firm discussed its quality assurance process, which includes checking and testing content, platform integration, accessibility, and browser compatibility. The firm proposed enhancements to improve website navigation, accessibility compliance, the user experience, as well as provide more functionality and features to allow OCTA the capability to make modifications to the website.

Fortuitas addressed the elements of the scope of work in its work plan. The firm proposed to perform an analysis and audit of the current website, which includes website security, responsiveness, accessibility compliance, and usability testing. The firm proposed to upgrade the OCTA website to the latest Ektron CMS version and described the upgrade process to ensure content and features remain functional. Fortuitas described its quality assurance process, such as its workflow process for performing error corrections and implementing enhancements to the website, communication process and tools, response times to address urgent issues, and handling all support issues related to Ektron. Fortuitas also discussed its project management approach to ensure projects are completed within budget and schedule. Fortuitas proposed various enhancements, such as enhanced search functionality, social media integrations, and a content update feature.

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 rate on their relation to the lowest weighted average hourly rate. While Web Advanced proposed a higher weighted average hourly rate, the rate is commensurate with their level of experience and in-depth understanding of the scope of work requirements. Additionally, the proposed rates are consistent with the OCTA project manager's independent cost estimate and are the same as what OCTA currently pays for website maintenance support services.

Procurement Summary

Based on the evaluation of written proposals, the firms' qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of Web Advanced as the top-ranked firm to provide website maintenance support services. Web Advanced delivered a thorough and comprehensive proposal and an interview that was responsive to all the requirements of the RFP.

Fiscal Impact

The project was approved in OCTA's Fiscal Year 2020-21 Budget, External Affairs Division, Account Nos. 1831-7519-A0001-G82 and 0017-7519-M0201-0KG and is funded through local and Measure M2 funds.

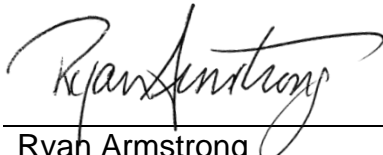
Summary

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2524 between the Orange County Transportation Authority and Web Advanced, in the amount of \$900,000, for a four-year initial term with one, three-year option term, for web maintenance support services.

Attachments

- A. Review of Proposals, RFP 0-2524 Website Maintenance Support Services
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 0-2524 Website Maintenance Support Services
- C. Contract History for the Past Two Years, RFP 0-2524 Website Maintenance Support Services

Prepared by:

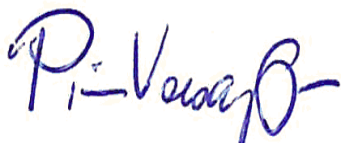


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