




**February 18, 2021**

**To:** Legislative and Communications Committee

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

**Subject:** Agreement for On-Call Planning Studies Public Outreach Consultant Services

### **Overview**

On October 21, 2020, the Orange County Transportation Authority released a request for proposals for public outreach consulting services for upcoming planning studies. 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 these services.

### **Recommendations**

- A. Approve the selection of Arellano Associates, LLC as the firm to provide public outreach consulting services for upcoming planning studies.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2622 between the Orange County Transportation Authority and Arellano Associates, LLC, in the amount of \$275,000 for a two-year initial term with one, one-year option term, to provide public outreach consulting services for upcoming planning studies.

### **Discussion**

The Orange County Transportation Authority (OCTA) works with federal, state, regional, and local officials, community groups, diverse communities, businesses, and other transportation agencies to provide the public with transportation improvements and solutions. OCTA's mission is to coordinate efforts among these various parties to identify, design, fund, and implement transportation improvements and solutions, and to improve air quality.

OCTA's Public Outreach Department (Department) is responsible for generating public awareness for multiple transportation studies, projects, and services.

Public outreach activities include, but are not limited to, development of handouts, fact sheets, infographics, e-newsletters, social media and web content, and execution of online surveys and mailings. The Department also plans and implements stakeholder in-person and virtual meetings, elected officials roundtables, pop-up events, public hearings and open houses, special events, and various other activities to ensure feedback is received from a broad spectrum of constituents. In an effort to reach diverse communities and encourage meaningful involvement of all people regardless of race, color, national origin, or income, engagement materials and surveys will be provided in multiple languages. In addition, staff partners with various community groups including OCTA's Diverse Community Leaders Group and Special Needs Advisory Committee in the development and implementation of planning studies.

OCTA is seeking an on-call consultant to plan and execute various public engagement activities for upcoming transportation planning studies, as needed, over the next two years. Following are two upcoming studies in which public outreach support will be required in 2021.

*Long-Range Transportation Plan (LRTP)*

The LRTP is developed and updated every four years to define a vision for Orange County's transportation system and analyze how well that vision addresses future mobility needs. This vision must consider a 20+ year forecast of available revenues, changing demographics, and other significant trends.

*Orange County Mobility Hub Study*

The Countywide Mobility Hub Strategy includes a vision for an integrated suite of mobility and accessibility services, supporting amenities, and technologies that together bridge the distance between high-frequency transit and an individual's origin or destination. This will make connecting to transit easier while also providing travelers with more sustainable transportation choices.

Future planning studies will be supported by this on-call agreement as needed.

***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 October 21, 2020, Request for Proposals (RFP) 0-2622 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on October 21 and 26, 2020. A pre-proposal conference was held on October 26, 2020, with six attendees representing five firms. Four addenda were issued to make available the pre-proposal conference registration sheet and presentation, provide responses to written questions, as well as to handle administrative issues related to the RFP.

On November 11, 2020, six proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Public Outreach, Planning and Analysis, as well as Marketing and Customer Engagement departments met to review all the proposals received.

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

- |                                     |            |
|-------------------------------------|------------|
| • Qualifications of the Firm        | 25 percent |
| • Staffing and Project Organization | 30 percent |
| • Work Plan                         | 25 percent |
| • Cost and Price                    | 20 percent |

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm was weighted at 25 percent as the firm had to demonstrate experience developing and implementing public outreach programs for similar planning studies. Staffing and project organization was weighted at 30 percent as the project team had to demonstrate extensive expertise with engaging and communicating with various stakeholders, as well as an understanding of Orange County transportation issues. Work plan was weighted at 25 percent as the firm had to demonstrate an understanding of the scope of work requirements and describe its public outreach approach for the upcoming planning studies. Cost and price was weighted at 20 percent to ensure OCTA receives value for the services provided.

The evaluation committee utilized a best-value selection process for this RFP. The best-value determination is based on a 100-point scale. 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, and work plan, which represented a maximum of 80 points of the total proposal score. Once the technical scores of the short-listed firms were determined, the sealed price

proposals were then opened. The pricing score represented a maximum of 20 points of the total proposal score.

On November 18, 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

Arellano Associates, LLC (Arellano)  
Chino Hills, California

McCormick-Busse, Inc. doing business as MBI Media (MBI)  
Covina, California

On December 2, 2020, the evaluation committee conducted interviews with the short-listed firms. The interviews 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 experience with Orange County stakeholders and communities, experience dealing with constituents' concerns, outreach approach during the coronavirus (COVID-19) pandemic, and outreach tactics to address racial and socio-economic disparities, as well as specific clarification questions related to each firm's proposal.

At the conclusion of the interviews, the firms were requested to submit a best and final offer (BAFO) to provide more competitive pricing. Both firms made adjustments to their proposed hourly rates.

After considering responses to questions asked during the interviews and the information provided in the BAFOs, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores. However, Arellano 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 and BAFOs, the evaluation committee recommends Arellano for consideration of the award. The following is a brief summary of the proposal evaluation results.

### Qualifications of the Firm

Arellano was established in 1994 and has a single office in the City of Chino Hills with 46 employees. The firm demonstrated relevant experience providing public outreach services for several transportation planning studies, such as the environmental phase of the Interstate 605 Corridor Improvement Project, Integrated Mobility Hubs Project with the Los Angeles County Metropolitan Transportation Authority (Metro), and the Anaheim Regional Intermodal Transportation Center Project with the City of Anaheim. Arellano has also provided public outreach services as the lead consultant on multiple OCTA projects, including the 2018 LRTP, Transit Master Plan, Beach Boulevard Transit Corridor Study, Freeway Bus Rapid Transit Concept Study, and the Interstate 5 Improvement Project. In addition, the firm is a subconsultant to the project management consultant for the OC Streetcar.

MBI was founded in 1989 and is headquartered in the City of Covina with three additional offices. The firm has 25 employees. MBI demonstrated relevant experience providing public outreach services for various transportation projects. The firm provided public outreach services on Metro's LRTP and the Anaheim Resort Area Mobility Plan for the City of Anaheim Public Works. MBI is currently working with OCTA as the lead public outreach consultant for the South Orange County Multimodal Transportation Plan Study and serves as a subcontractor on the Interstate 405 Improvement Project and the State Route 55 Improvement Project. The firm also developed a video for OCTA's 2018 LRTP to inform stakeholders of the goals and intent of the project.

### Staffing and Project Organization

Arellano proposed a project team with extensive experience and includes the same individuals currently providing public outreach services for OCTA's transportation planning studies. The proposed project manager has over 20 years of experience in community relations, program management, and strategic planning. The proposed community liaison has 12 years of experience supporting transportation and planning projects. Arellano described the project team's experience in key outreach areas, such as engaging stakeholders on complex transportation projects, developing tailored outreach programs, implementing diverse outreach plans, and an understanding of Orange County transportation issues. The project team is proposed with ample availability for this effort. During the interview, the project team discussed their roles and approach, as well as provided detailed responses to the evaluation committee's questions, which demonstrated the project team's expertise and proactive outreach strategies.

MBI proposed a project team with relevant experience. The proposed project manager has 23 years of experience in strategic planning, transit, tolling, and highway projects. MBI proposed four community liaisons with experience providing public outreach for transportation planning projects. The project team demonstrated an understanding of Orange County transportation projects, as well as experience in engaging stakeholders, communicating technical information, and developing diverse outreach programs for various transportation projects. The project team is proposed with sufficient availability for this effort. The project team discussed their roles and approach during the interview. The project team members demonstrated their knowledge and experience through their responses to the evaluation committee's questions.

#### **Work Plan**

Arellano presented a comprehensive work plan that addressed all the elements of the scope of work. The firm discussed its project management approach and processes for managing quality assurance/quality control (QA/QC), project schedule, and budget. The firm detailed its approach and strategies to developing the study-specific public outreach plans. The firm detailed its traditional and innovative outreach methods to inform and solicit input from stakeholders, such as public workshops, social media programs, geofencing, canvassing, and online comment forums. The firm's approach includes ensuring that public outreach activities and collateral materials comply with Title VI and Environmental Justice initiatives. Arellano indicated that the public outreach plans will include protocols to address the ongoing COVID-19 pandemic with a full virtual outreach program and/or a hybrid program involving in-person engagement. Since the start of the pandemic, the firm has implemented a range of virtual outreach methods to engage the community with webinars, virtual workshops, and online surveys. Arellano also described its process for public input documentation and preparing a summary report, as well as preparing final reports for all outreach efforts conducted for each planning study. As an enhancement, Arellano discussed its in-house innovations team, which researches and utilizes new technologies and innovative solutions that can be used to maximize stakeholder engagement and add value to projects.

While MBI addressed the elements of the scope of work in its work plan, the firm provided a general approach overall. The firm discussed its approach related to project management, QA/QC process, as well as budget and schedule controls. MBI discussed its approach to developing the public outreach plans for each study and outlined the activities involved. The firm described how it would provide general public outreach support, such as stakeholder outreach meetings and public workshops; develop collateral, including graphic design, copywriting, and translation; and manage events both virtually and in-person. MBI addressed

the COVID-19 pandemic and planned to utilize digital-based and virtual media for outreach to ensure engagement with stakeholders.

#### **Cost and Price**

Both firms submitted a BAFO and made adjustments to their proposed hourly rates. Pricing scores were based on a formula which assigned the higher score to the firm with the lower weighted average hourly rate, and scored the other proposal's weighted average hourly rate based on its relation to the lower weighted average hourly rate. Although MBI proposed a lower weighted average hourly rate, Arellano's proposed hourly rates are comparable to the hourly rates for other OCTA public outreach contracts. Furthermore, Arellano's experience and detailed work plan demonstrates the firm's ability to provide a comprehensive range of services that adds value to OCTA. Therefore, Arellano's proposed hourly rates are deemed fair and reasonable.

#### **Procurement Summary**

Based on the evaluation of written proposals, the firms' qualifications, and the information obtained from the interviews and BAFOs, the evaluation committee recommends the selection of Arellano as the top-ranked firm to provide public outreach consulting services for upcoming planning studies. Arellano 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, Accounts 1861-7519-A0001-OLM and 1861-7519-A4461-1I8 and is funded through local funds.

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**Summary**

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2622 between the Orange County Transportation Authority and Arellano Associates, LLC, in the amount of \$275,000, for a two-year initial term with one, one-year option term to provide public outreach consulting services for upcoming Orange County Transportation Authority planning studies.

**Attachments**

- A. Review of Proposals, RFP 0-2622 On-Call Planning Studies Public Outreach Consultant Services
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 0-2622 On-Call Planning Studies Public Outreach Consultant Services
- C. Contract History for the Past Two Years, RFP 0-2622 On-Call Planning Studies Public Outreach Consultant Services

**Prepared by:**

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