



***April 15, 2021***

**To:** Legislative and Communications Committee  
**From:** Darrell E. Johnson, Chief Executive Officer  
**Subject:** Agreement for Customer Information Center Services

### ***Overview***

On December 14, 2020, the Board of Directors approved the release of a request for proposals for the operation of the Customer Information Center. 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 Alta Resources Corp. as the firm to operate the Customer Information Center.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2698 between the Orange County Transportation Authority and Alta Resources Corp., in the amount of \$2,980,440, for a three-year initial term, effective July 1, 2021 through June 30, 2024, with two, two-year option terms.

### ***Discussion***

The Orange County Transportation Authority (OCTA) provides bus service information to the public through OCTA's website, various digital communications, the online and printed bus book, as well as the Customer Information Center (CIC).

OCTA has been outsourcing the services provided by the CIC since 1995. Currently, CIC services include assisting customers with trip itineraries and other transit information, processing pass sales orders, answering questions regarding the OCTA Reduced Fare Identification (RFID) program, and receiving and recording customer comments and complaints. In 2019, the CIC began answering calls made to the OCTA administrative offices and call routing, along with taking

lost and found inquiries. The CIC currently handles approximately 300,000 calls annually. Call volumes are dynamic and spike in conjunction with events such as service changes and fare adjustments.

The CIC utilizes automated telephone information system technology, which allows customers to select options for recorded information or speak with a representative in English or Spanish. The CIC also provides a language translation service to communicate information between a customer and the representative in any language needed and is also able to respond to customers who are hearing impaired. Currently, the CIC operates seven days a week, 365 days per year.

OCTA has established performance goals for call center operations to ensure customers receive high-quality service. The performance goals require that 80 percent of all calls be answered within two minutes and no more than one CIC-related complaint per 15,000 calls answered. Additionally, CIC staff members are required to ride the fixed-route bus system quarterly to maintain familiarity with the service.

In response to changing customer communication preferences, the new contract for the CIC operations includes additional customer communications channels, including social media. As an example, if a customer asks for information on Facebook or other social media channels about how to use transit services, CIC representatives would be able to directly respond on social media. An upgrade to OCTA's existing customer relations case/customer relationship management software, including integrated social media case management, is currently underway and expected to be completed by the start of the new CIC operations contract.

OCTA has experienced a continuing increase in the amount of social media customer activity, in both customer information inquiries and customer relations comments. Furthermore, feedback from other transit properties about communication channels indicates that the addition of social media and other channels such as Short Message Service (SMS) messages and online chat is beneficial in better serving customer needs and improving response speed and efficiency.

### ***Procurement Approach***

The procurement was handled in accordance with OCTA's Board of Directors (Board)-approved procedures for professional and technical services. Various factors were 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 December 14, 2020, the Board authorized the release of Request for Proposals (RFP) 0-2698, which was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on December 14 and 21, 2020. A pre-proposal conference was held on December 21, 2020 with eight attendees representing five firms. Three addenda were issued to make available the pre-proposal conference registration sheet and presentation, respond to written questions, as well as to handle administrative issues related to the RFP.

On January 25, 2021, three proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Marketing and Customer Engagement, Paratransit Services, Financial Planning and Analysis, and Information Systems departments, as well as an external evaluator from Metrolink, met to review the proposals received.

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

- |                                     |            |
|-------------------------------------|------------|
| • 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 experience providing a range of similar call center services for an operation similar in size and nature. Staffing and project organization was weighted at 30 percent to ensure the firm proposed an experienced project team and demonstrated effective project organization to successfully manage the operation of OCTA's CIC. Work plan was weighted at 20 percent as the firm had to demonstrate its understanding of the project scope and explain how the call center will be managed to meet OCTA's customer service requirements. Cost and price was weighted at 20 percent to ensure that OCTA receives value for the services provided.

On February 10, 2021, 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

AAMCOM, LLC (AAMCOM)  
Redondo Beach, California

Alta Resources Corp. (Alta)  
Brea, California

On February 17, 2021, the evaluation committee conducted interviews with both firms. The interview consisted of a presentation by each firm to demonstrate the firm's understanding of OCTA's requirements. The firms were also requested to provide photographs and/or videos of their facilities. 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 new customer communication channels, handling increases in call volume, training procedures, staff retention, and current work environment. In addition, each team was asked specific clarification questions related to its proposal.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary scores and made adjustments to individual scores. However, Alta 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, as well as cost and price, the evaluation committee recommends Alta for consideration of the award. The following is a brief summary of the proposal evaluation results.

**Qualifications of the Firm**

Alta has been providing call center services since 1995 and has 4,000 employees across five call centers located throughout the United States and Asia. The firm's clients include Access Services, The Walt Disney Company, Johnson & Johnson, Metrolink, and OCTA. The firm has been operating OCTA's CIC since 2001. Alta proposed to continue operations from its 42,000 square foot facility in the City of Brea. The firm indicated that it has expanded operations at the facility to accommodate new and existing client growth. Additionally, Alta has expanded its services to meet clients' evolving needs, such as managing social media, online chat, email, and SMS.

AAMCOM was founded in the 1950s and is headquartered in a 3,000 square foot facility in the City of Redondo Beach with a second call center location in Baja, Mexico and a data center in the City of Santa Ana. The firm has over 50 employees. AAMCOM provides call center services to the Los Angeles County Service Authority for Freeway Emergencies, Los Angeles Department of

Transportation, San Bernardino County Transportation Authority, and Torrance Memorial Physicians Network Internists. Although the firm has experience providing customer information support, the firm demonstrated limited experience handling customer comments and complaints.

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

Alta proposed the same project team currently providing CIC services, which will ensure uninterrupted operations of the CIC. The proposed project manager has been with the firm for 19 years and is committed to ensuring that the CIC team meets OCTA's requirements. The proposed dedicated team leader has been with Alta for seven years and will be responsible for the day-to-day scheduling and supervision of the CIC staff, as well as an escalation resource should the need arise. Although recruitment of an initial team is not required, Alta has resources and processes in place to hire and train additional staff as new communication channels are added. During the interview, the firm clarified that it provides refreshers and follow-up training to staff. The project team's presentation and detailed responses to the evaluation committee's questions further demonstrated the team's expertise and ability to continue operating the CIC.

AAMCOM proposed a project team with call center experience. The proposed project manager has 13 years of experience and has been with the firm for one year. The proposed team leader has over 25 years of experience and has been with the firm for over a year. The firm also proposed a transition team and described its recruitment procedures. During the interview, AAMCOM clarified it has staff available to provide CIC services if the firm is awarded the contract. AAMCOM detailed its training program, which includes 20 hours of classroom instruction. Although given the opportunity to elaborate and provide examples of the team's experience and understanding of the requirements, the project team provided general responses to the evaluation committee's questions.

#### **Work Plan**

Alta presented a comprehensive work plan that demonstrated an understanding of the scope of work requirements. In addition to continuing to provide current CIC services, the firm discussed its ability to manage multiple communication channels like social media, online chat, and SMS. The firm also indicated that it is capable of handling calls for the OC Streetcar once service begins. The scope of work included the addition of new communication channels, such as social media. During the interview, the firm described its experience managing customer inquiries and customer relations comments using social media for several clients. Alta has troubleshooting and resolution procedures in place, as well as a multi-disaster recovery plan. To demonstrate its response to an emergency like the coronavirus (COVID-19) pandemic, Alta implemented a hybrid work environment with the majority of staff working remotely with

protocols in place for staff coming into the office. Operations have remained consistent with very low absenteeism and turnover. Alta described its approach to meeting OCTA's requirement for completing regular test rides on the OC Bus service, contingent on the COVID-19 pandemic, to ensure familiarity with the Orange County area and OCTA service.

AAMCOM's proposal demonstrated a general understanding of the scope of work. The firm described its system capabilities, installation and testing procedures, as well as its transition plan to be operational by July 1, 2021. The firm described its emergency and disaster plan and troubleshooting procedures. The firm did not address new communication channels, handling calls for the OC Streetcar, and completing the required tests rides in its proposal. Clarification questions were asked in the interview regarding those areas; however, AAMCOM's responses did not provide assurance of the firm's experience and ability to successfully meet the requirements. In response to the COVID-19 pandemic, AAMCOM continued in-person operations with protocols in place, such as social distancing and face masks, until an outbreak in late November 2020. Since then, the firm has shifted to a hybrid work environment.

#### Cost and Price

Pricing scores were based on a formula which assigned the highest score to the firm with the lowest weighted average monthly cost, and scored the other proposal's weighted average monthly cost based on its relation to the lowest weighted average monthly cost. The weighted average monthly cost is comprised of fixed monthly costs, as well as variable monthly costs per call volume for various activities including customer inquiries, customer relations calls, and social media responses.

Alta proposed the lowest weighted average monthly cost, which is less than what OCTA currently pays for the services. During the interview, Alta indicated that it was able to reduce costs by 17 percent while still maintaining the same level of service as a result of the updates to the scope of work, such as the addition of new communication channels and adjustments to the pricing structure, which includes both fixed and variable costs.

#### 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 Alta as the top-ranked firm for operation of the CIC. Alta delivered a thorough and comprehensive proposal and an interview that was responsive to all the requirements of the RFP.

**Fiscal Impact**

The project will be included in OCTA's Fiscal Year 2021-22 Budget, pending budget approval, External Affairs, Marketing and Customer Engagement, Account No. 1837-7519-D4601-1E4. These budget items are funded by Orange County Transit District Fund.

**Summary**

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-0-2698 with Alta Resources Corp., in the amount of \$2,980,440, for a three-year initial term, effective July 1, 2021 through June 30, 2024, with two, two-year options, for operation of the Customer Information Center.

**Attachments**

- A. Review of Proposals, RFP 0-2698 Customer Information Center
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 0-2698 Customer Information Center
- C. Contract History for the Past Two Years, RFP 0-2698 Customer Information Center

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