




September 16, 2021

To: Legislative and Communications Committee

From: Darrell E. Johnson, Chief Executive Officer 

Subject: Agreement for Public Outreach Consultant Services during the Environmental Phase of the Interstate 5 Improvement Project from the San Diego County Line to Avenida Pico

Overview

On June 1, 2021, the Orange County Transportation Authority released a request for proposals for public outreach consulting services during the Environmental Phase of the Interstate 5 Improvement Project from the San Diego County Line to Avenida Pico. 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 McCormick-Busse, Inc., doing business as MBI Media, as the firm to provide public outreach consulting services during the Environmental Phase of the Interstate 5 Improvement Project from the San Diego County Line to Avenida Pico.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-1-3353 between the Orange County Transportation Authority and McCormick-Busse, Inc., doing business as MBI Media, in the amount of \$298,450, for a three-year initial term, effective through October 31, 2024, with an option term of up to 24 months, to provide public outreach consulting services during the Environmental Phase of the Interstate 5 Improvement Project from the San Diego County Line to Avenida Pico.

Discussion

The Orange County Transportation Authority (OCTA), in cooperation with the California Department of Transportation (Caltrans) District 12, is proposing

improvements to Interstate 5 (I-5) in the City of San Clemente from the San Diego County Line to Avenida Pico (Project). The Project is currently in the Project Approval/Environmental Document (PA/ED) phase, during which the Project Report and ED are being developed.

The Project, approved by the OCTA Board of Directors (Board) on April 13, 2020, would complete the high-occupancy vehicle (HOV) lane network in Orange County and complement the I-5 HOV improvements that were recently completed as part of Project C in the Measure M2 freeway program. The Project proposes to construct one HOV lane in each direction on I-5 from the San Diego County Line to Avenida Pico, reestablish existing auxiliary lanes, and modify interchange ramps.

The purpose of the public outreach program is to meet the legal notice requirements set forth in the California Environmentally Quality Act (CEQA) and the National Environmental Policy Act (NEPA). In keeping with OCTA's best practices, the public outreach program will seek to generate widespread public awareness, engage key stakeholders, and increase public confidence in the environmental review and preferred alternative recommendation and approval processes.

In addition to a proactive, comprehensive multimedia outreach plan, deliverables will include creation and management of a project webpage and development of collateral materials, including presentations, fact sheets, maps, frequently asked questions, graphics, infographics, e-newsletters, social media content, canvassing flyers, and monthly and final reports. As part of the outreach program, virtual and in-person stakeholder briefings and ascertainties will be conducted to secure feedback from a wide and representative range of stakeholders and members of the public.

Consistent with OCTA's diversity, equity, and inclusion practices, the public outreach program will account for diverse communities and encourage meaningful involvement of all people regardless of race, color, national origin, or income. Public information and engagement materials will be provided in various languages. Similarly, outreach staff will work together with OCTA's Diverse Community Leaders Group and the Accessible Transit Advisory Committee.

Procurement Approach

The procurement was handled in accordance with OCTA 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 June 1, 2021, Request for Proposals (RFP) 1-3353 was issued electronically on CAMM NET. The procurement was advertised in a newspaper of general circulation on June 1 and June 7, 2021. A pre-proposal conference was held on June 8, 2021, with five attendees representing four firms. Two addenda were issued to make available the pre-proposal conference registration sheet and presentation, as well as provide responses to written questions related to the RFP.

On June 28, 2021, four proposals were received. An evaluation committee consisting of OCTA staff from the Contracts Administration and Materials Management, Public Outreach, Highway Programs, and Planning and Analysis Departments, as well as an external evaluator from the City of San Clemente, 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 | 20 percent |
| • Staffing and Project Organization | 30 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 20 percent, as the firm had to demonstrate experience providing public outreach services on complex public works projects during the environmental phase. Staffing and project organization was weighted at 30 percent, as the project team had to demonstrate experience engaging the public during the environmental phase of complex transportation projects, as well as include a blend of senior and junior level staff having adequate availability. Work plan was weighted at 30 percent, as the firm had to demonstrate an understanding of the scope of work, as well as the ability to meet the public outreach requirements mandated by CEQA and NEPA to engage key stakeholders, including underserved, diverse communities. Cost and price was weighted at 20 percent, to ensure the outreach program is delivered efficiently and that 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 July 13, 2021, the evaluation committee reviewed the four proposals received 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 Media)
Covina, California

On July 20, 2021, the evaluation committee conducted interviews with the two 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 the allocation of responsibilities and resources among project team members, conducting hybrid meetings, outreach strategies to engage various stakeholders including underserved, diverse communities, complying with CEQA and NEPA requirements, as well as specific clarification questions related to each firm's proposal.

At the conclusion of the of the interviews, a request for clarification was issued to MBI Media to clarify the project team's proposed allocation of resources.

After considering responses to questions asked during the interviews and the information provided in the request for clarification, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores. As a result, the rankings changed.

Based on the evaluation of the written technical proposals and the information obtained from the interviews and request for clarification, as well as cost and price, the evaluation committee recommends MBI Media for consideration of the award. The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

MBI Media was founded in 1989 and is located in the City of Covina with 30 employees. MBI Media demonstrated relevant experience providing public outreach services for freeway improvement projects during the environmental phase, such as the State Route 55 (SR-55) (I-5 to State Route 91 [SR-91]) Improvement Project Final Environmental Document with OCTA, the US-101 Improvement Project for Ventura County Transportation Commission, and the Interstate 710 Corridor Project EIR/Environmental Impact Statement and SR-710 North Environmental Study with Los Angeles County Metropolitan Transportation Authority (LA Metro). MBI Media also provided public outreach services on the SR-91 Corridor Improvements Project with Riverside County Transportation Commission and is currently providing public outreach services as a subconsultant on the Interstate 405 (I-405) Improvement Project. The firm proposed TRC Companies, Inc. (TRC) as a subconsultant to provide strategic stakeholder oversight and outreach support. TRC's work on the public outreach for SR-55 Improvement Project and I-5 South County (Avenida Pico to San Juan Creek Road) demonstrates the firm's experience related to the environmental phase and familiarity with the Project corridor. MBI Media also proposed a subcontractor for media production services.

Arellano was established in 1994 and is located in the City of Chino Hills with 50 employees. The firm demonstrated extensive experience providing public outreach services for complex freeway projects during the environmental phase. These projects include the I-5 (I-405 to SR-55) PA/ED Project, SR-91 (State Route 57 to SR-55) Improvement Project, and I-5 South County (Avenida Pico to San Juan Creek Road) with OCTA, as well as the Interstate 605 Corridor Improvement Project with LA Metro. Arellano is currently serving as a subconsultant for public outreach on the OC Streetcar. Costin Public Outreach Group, Inc. (CPOG), is proposed as a subconsultant to provide additional public outreach support. CPOG's relevant experience includes the Interstate 10 (I-10) Eastbound Truck Climbing Lanes and the San Bernardino Express Lanes (I-10 Corridor Contract 1) with San Bernardino County Transportation Authority. CPOG's team members have experience with stakeholders in the Project corridor having worked on the I-5 South County Improvement Project and TCA's South County Traffic Relief Effort.

Staffing and Project Organization

MBI Media proposed a project team with relevant experience. The proposed project manager has 18 years of experience in environmental and highway projects. The firm proposed a lead community liaison along with three community liaisons with unique roles and skills assigned to specific outreach efforts, which will enable them to complement each other. The lead community liaison has five years of experience, which includes providing public outreach for multiple projects during the environmental phase. The project team demonstrated familiarity and knowledge of the Project corridor and stakeholders, as well as the CEQA and NEPA process and legal requirements. During the interview, the project team presented its roles and outreach approach. The team provided detailed responses to the evaluation committee's questions, such as elaborating on the CEQA and NEPA process and identifying specific stakeholder groups within the City of San Clemente, adjacent cities, and motorists along the Project corridor.

Arellano proposed an experienced and knowledgeable project team. The proposed project manager has over 20 years of experience in community relations, environmental programs, and diversity outreach. The firm proposed two lead community liaisons with 13 and 15 years of experience, respectively. Both community liaisons have worked on transportation projects in Orange County and one of the proposed community liaisons has extensive experience working with various stakeholders in south Orange County. The project team demonstrated experience working on complex freeway projects and engaging stakeholders in the Project area. Arellano discussed its approach and strategies during the interview and the project team's responses to the evaluation committee's questions further demonstrated their understanding of the outreach requirements, including adhering to CEQA and NEPA guidelines, and local knowledge of the Project area and key stakeholders.

Work Plan

MBI Media and Arellano presented comprehensive work plans that addressed all the elements of the scope of work. Both firms discussed their outreach approach, including complying with the CEQA and NEPA requirements to inform and gather feedback from the public, conducting stakeholder ascertainties, and developing diverse community engagement.

MBI Media described its proposed community outreach plan, which will incorporate the expected challenges with this Project, as well as insights and lessons learned from previous I-5 projects. The firm will also evaluate prior and

current stakeholder outreach efforts by OCTA to develop the outreach plan. The firm identified communities, stakeholders, and community-based organizations to engage, such as the City of San Clemente, Ranch Mission Viejo, San Clemente Outlets, and Camp Pendleton, as well as local hotels along the Project corridor. Due to the ongoing coronavirus pandemic, MBI Media proposed to emphasize the use of electronic and social media outreach strategies to provide stakeholders an opportunity to participate in the public engagement process safely and conveniently. MBI Media utilizes a virtual meeting room platform for stakeholder meetings, which includes the same collateral materials and information that would be provided in an in-person public meeting. The firm indicated that traditional, grassroots canvassing is also needed to distribute information to those who do not have access to the internet or who have been historically marginalized. MBI Media will identify and engage underserved, diverse community members that have an interest in, or might be impacted by the Project.

Arellano described the project team's roles to ensure that the outreach goals and objectives are reached. The firm discussed the Project area and the stakeholder groups and communities that are impacted by the I-5 Freeway, such as Southwest San Clemente, The Reserve, San Clemente Pier, and T-Street Beach. The firm proposed to provide an outreach plan that engages and informs the public about planned improvements and that the messaging is clear and concise. Arellano stressed that the focus of the outreach efforts is to develop public awareness and not to advocate or promote one alternative over another. For public meetings, the firm proposed a hybrid meeting approach that incorporates virtual elements like webcasts, webinars, and interactive tools, with in-person meetings. Arellano will ensure that its outreach plan is designed to engage diverse and disadvantaged communities by incorporating grassroots canvassing, in-language collateral materials, and multi-lingual outreach.

Cost and Price

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. MBI Media proposed a lower weighted average hourly rate; therefore, they received the higher score for cost and price. MBI Media's proposed hourly rates are deemed fair and reasonable as they are comparable to the rates OCTA currently pays for similar public outreach services.

Procurement Summary

Based on the evaluation of written proposals, the firms' qualifications, the information obtained from the interviews and request for clarification, as well as cost and price, MBI Media is the top-ranked firm to provide public outreach consulting services during the Environmental Phase of the Project.

Fiscal Impact

The Project was approved in OCTA's Fiscal Year 2021-22 Budget, External Affairs Division, Account No. 1861-7519-A0001-OLM.

Summary

Staff is recommending the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-1-3353 between the Orange County Transportation Authority and MBI Media, in the amount of \$298,450, for a three-year initial term, with an option term of up to 24 months, to provide public outreach consulting services for the Environmental Phase of the Project.

Attachments

- A. Review of Proposals, RFP 1-3353 Public Outreach for Environmental Phase of Interstate 5 Improvements from County Line to Avenida Pico
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 1-3353 Public Outreach for Environmental Phase of Interstate 5 Improvements from County Line to Avenida Pico
- C. Contract History for the Past Two Years, RFP 1-3353 Public Outreach for Environmental Phase of Interstate 5 Improvements from County Line to Avenida Pico

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