



**June 15, 2023**

**To:** Legislative and Communications Committee

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

**Subject:** Agreement for Public Outreach Consultant Services for the Interstate 605/Katella Avenue Interchange Project

### **Overview**

On December 22, 2022, the Orange County Transportation Authority released a request for proposals for public outreach consulting services during the pre-construction and construction phases of the Interstate 605/Katella Avenue Interchange Project. Board of Directors' approval is requested to execute an agreement for these services.

### **Recommendations**

- A. Approve the selection of Costin Public Outreach Group, Inc., as the firm to provide public outreach consultant services for the Interstate 605/Katella Avenue Interchange Project.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-2-3025 between the Orange County Transportation Authority and Costin Public Outreach Group, Inc., in the amount of \$399,887, for a three-year initial term with a two-year option term, to provide public outreach consultant services for the Interstate 605/Katella Avenue Interchange Project.

### **Discussion**

The Interstate 605 (I-605)/Katella Avenue Interchange Project (Project) is known as Project M in the Measure M2 program and connects the I-605, a major north-south transportation route in Orange and Los Angeles counties, with Katella Avenue, an east-west regional corridor that crosses through the two counties. The Project area includes the interchange as well as Katella Avenue between Coyote Creek Channel at the Orange and Los Angeles county line and Civic Center Drive in the City of Los Alamitos, adjacent to the community of Rossmoor.

The \$35 million Project is funded by local and federal funds and includes widening the northbound loop off-ramp and the southbound on- and off-ramps and realigning and widening the northbound on-ramp. In addition, Katella Avenue will be widened in both directions to provide standard-width lanes and shoulders within the interchange, which will tie in with the ramp improvements.

The Project is in the final design phase, which is expected to be completed in mid-2023. Right-of-way activities, such as utility relocation agreements, appraisals, acquisitions, and certifications, are anticipated to continue through mid-2024. The Project will be advertised for construction by the California Department of Transportation (Caltrans) in summer 2024 and a contract will be awarded in late 2024. Construction is expected to take approximately two years.

Consultant services are needed to support outreach efforts during the pre-construction and construction phases of the Project. These consultant services will aid the Orange County Transportation Authority (OCTA) and Caltrans with the development and delivery of communications on a day-to-day basis and provide advanced public information messages that help the public know what to expect during construction and upcoming activities as well as understand the value and benefits of investments in Orange County's transportation network.

The selected consultant will develop and implement a comprehensive public outreach program that will engage with all applicable stakeholders, including diverse and disadvantaged communities, using a variety of methods and tools, such as:

- Conducting one-on-one meetings with city representatives, key stakeholders, community-based organizations, and members of the business, ethnic, and faith communities
- Attending city council and speaker's bureau presentations
- Sending email newsletters and automated notifications
- Hosting in-person and virtual neighborhood meetings
- Creating an interactive closures and detours map
- Developing a social media, digital communications, and geofencing communication plan and content for a Project website
- Producing print and digital collateral materials
- Coordinating pre- and post-construction surveys
- Facilitating implementation of temporary construction easements
- Assisting with resolving constituent concerns and issues
- Coordinating collateral canvassing efforts

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***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, and work plan, as well as cost and price.

On December 22, 2022, Request for Proposals (RFP) 2-3025 was issued electronically on CAMM NET. The Project was advertised in a newspaper of general circulation on December 27, 2022, and January 9, 2023. A pre-proposal conference was held on January 12, 2023, with four attendees representing three 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 January 30, 2023, two proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Highway Programs, Public Information, and Public Outreach departments met to review all the proposals received.

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

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

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm was weighted at 20 percent to ensure the firm has prior experience providing public outreach services on complex transportation projects during the pre-construction and construction phases. Staffing and project organization was weighted at 25 percent as the firm had to present an experienced, well-rounded team consisting of senior and junior level staff with adequate availability and relevant experience performing outreach services on large construction projects. Work plan was weighted at 30 percent to ensure the firm's approach addressed the unique needs of a corridor composed of residential, commercial, and industrial businesses that serves motorists driving to and from Orange County and Los Angeles County. Additionally, the proposed work plan had to demonstrate an understanding of the Project scope and challenges, as well as the level of effort required to complete the requirements

of the scope of work. Cost and price was weighted at 25 percent to ensure 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 with 75 points based on the evaluation of the technical proposal and the remaining 25 points based on the evaluation of the price proposal. 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. The two proposing firms were then interviewed. After the interviews, the technical scores of the firms were finalized and the sealed price proposals were then opened and shared with the evaluation committee. The cost and price score was then factored into the overall proposal score for a maximum of 100 points.

On February 13, 2023, the evaluation committee reviewed the two proposals received based on the evaluation criteria and determined both firms were qualified and are listed below in alphabetical order:

Firm and Location

Costin Public Outreach Group, Inc. (CPOG)  
Corona, California

Kleinfelder Construction Services, Inc. (Kleinfelder)  
San Diego, California

On February 22, 2023, the evaluation committee conducted interviews with the two 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 firm's approach for addressing specific ways to engage with multilingual, low-income, and other underrepresented populations, as well as anticipating specific stakeholder needs. The firms were also asked 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 no adjustments to individual scores. As a result, the rankings did not change.

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 CPOG for consideration of the award. The following is a brief summary of the proposal evaluation results.

#### Qualifications of the Firm

Both firms demonstrated relevant experience providing public outreach services for complex transportation projects during the pre-construction and construction phases, including maintaining and expanding the stakeholder database, planning and conducting multilingual outreach, compiling and providing communications metrics, as well as planning and executing small- and large-scale special events.

CPOG was founded in 2013 and has offices in the cities of Corona and Huntington Beach. The firm has ten employees and has provided public outreach services on various projects for the San Bernardino County Transportation Authority (SBCTA), such as the State Route 210 Lane Addition/Base Line Interchange Project, the Interstate 10 (I-10)/Cedar Avenue Interchange Project, the I-10/Alameda Street Interchange Project, the I-10/University Street Interchange Project, and the State Route 60 Archibald Avenue/Central Avenue Interchange Project. CPOG is also currently providing public outreach services to OCTA on the State Route 55 (SR-55) Improvement Project between Interstate 405 (I-405) and Interstate 5 (I-5). The firm proposed subconsultants for videography, photography, social media support, translation, and community outreach support services. CPOG received positive comments from its references.

Kleinfelder was founded in 1986 and has 87 employees. The firm is headquartered in San Diego and has an office in the City of Laguna Hills. The firm demonstrated extensive public outreach experience working on projects including OCTA's I-405 Improvement Project and West County Connectors Project, as well as Riverside County Transportation Commission's Menifee Interstate 215 Newport Road Interchange Project. The firm also provided outreach services for SBCTA on the I-5/Baseline Interchange Improvement Project, Orange County Public Works, the County of Orange Chief Executive Officer's Office, and the Riverside County Transportation Department. Kleinfelder proposed various subconsultants for community liaison, account coordinator, and 3-D visualization services. The firm received positive comments from its references.

### Staffing and Project Organization

CPOG proposed a project team with extensive experience. The proposed project manager is the founder of CPOG and has 31 years of public outreach experience, including managing outreach programs for several transportation projects throughout Southern California including the OCTA SR-55 Improvement Project (I-405 to I-5) and the SBCTA I-10 Express Lanes. The individual proposed as the lead community liaison has over 15 years of construction outreach experience and has worked on multiple interchange projects throughout San Bernardino County. The lead community liaison will be supported by two community liaisons. The project team is proposed with high availability and consists of senior and junior-level staff with experience engaging key stakeholders on various transportation and freeway projects. During the interview, the project team's presentation demonstrated an understanding and familiarity with the Project corridor and stakeholders. The team addressed key elements of the Project and provided specific examples of engaging impacted audiences. The team members demonstrated cohesiveness and provided detailed responses to the evaluation committee's questions, which emphasized their experience and individual strengths.

Kleinfelder proposed an experienced and knowledgeable project team. The proposed project manager has over 17 years of experience in community outreach and public relations, as well as leading outreach efforts on major projects such as OCTA's I-405 Improvement Project, which is still under construction, and the City of Escondido Citracado Parkway Extension Project. The proposed community liaison has ten years of experience, which includes the I-405 Improvement Project and Elsinore Valley Municipal Water District's Septic to Sewer Project. The proposed staff does not have experience implementing the projects listed in the proposal and only has experience working on the I-405 Improvement Project together. While Kleinfelder proposed a project team of several senior-level staff with relevant freeway construction experience, some of the proposed staff had very limited hours. When asked about this during the interview, the firm's response indicated that it was a precaution in the event of staff turnover.

### Work Plan

CPOG presented a comprehensive work plan that addressed all the elements of the scope of work. CPOG's work plan was highly detailed, tailored to the I-605/Katella Interchange Project, and demonstrated a strong understanding of the Project and the surrounding community. The firm proposed utilizing specific tools that it is currently using on OCTA's SR-55 Improvement Project, including the Smartsheet software to archive project documents, track deliverables, and

share files. CPOG provided clear and detailed stakeholder ascertainment, project archive, and communications plans, as well as identified little-known facts about the Project corridor, such as extensive/ongoing construction fatigue, maintaining school access, and mutual aid between jurisdictions. CPOG prepared an initial stakeholder list showcasing their corridor knowledge to properly customize community outreach plans for the unique interests of specific stakeholders. The firm also demonstrated an attention to detail and an understanding of the importance of consistency in branding, translations, and language. Furthermore, the firm discussed OCTA's diversity, equity, and inclusion framework and noted the importance of incorporating equity into its outreach efforts and wide range of communications tools, as well as plans to evaluate the effectiveness of its communications strategies throughout the project. CPOG identified specific potential communications campaigns and the need for targeted communication plans for closures, detours, and other construction impacts. The firm also discussed their video simulation, Waze, interactive maps, helpline, text messaging, and social media experience. Additionally, CPOG illustrated their experience with implementing geofencing ads, business support programs, media/government relations support and special event planning, and evaluating the success of the outreach efforts. The firm elaborated on potential challenges associated with the Project, particularly with active transportation groups and multicultural groups, and provided potential solutions. In addition, the firm provided real-world examples in their responses to the evaluation committee's questions to demonstrate their approach, understanding of the Project, and ability to implement a successful outreach program.

Kleinfelder's work plan demonstrated a strong understanding of the Project, OCTA's mission, and Measure M2, as well as diverse communities near the Project area and their outreach needs. The firm discussed its approach to building trust with stakeholders and integrating significant cultural holidays and milestones into social media content to better connect with those audiences. The firm demonstrated its understanding of construction and the importance of providing timely and accurate information. Kleinfelder elaborated on the importance of storytelling, such as utilizing feature stories of crews and emphasized the importance of consistent messaging, content, responsiveness, and embracing emerging communication trends. The firm also emphasized the importance of diverse community engagement beyond translating collateral and the importance of leveraging faith-based organizations, as well as providing a tailored approach to engaging unique audiences, such as college students and seniors. Kleinfelder recommended the use of innovative and multimedia communications tools, such as a unique navigation map partnership with Waze and Apple Map editors, as well as ArcGIS Story Maps. The firm also provided case study examples and outlined potential challenges and solutions. However,

the work plan did not clearly address certain elements of the scope of work, such as the project archive and stakeholder ascertainment plan. Although Kleinfelder detailed its approach and strategies during the interview, the firm did not elaborate or mention key outreach elements, such as how the ascertainment effort would be the foundation of all communication planning.

#### Cost and Price

Pricing scores were based on a formula that assigned the highest score to the firm with the lowest weighted average hourly rate and scored the other proposal's weighted average hourly rate based on its relation to the lowest weighted average hourly rate.

For cost and price analysis purposes, the weighted average hourly rate considers the proposed hourly rates of key job functions consisting of the project manager, community liaison, account coordinator, and graphic designer, as these positions are considered key positions for this Project. Offerors can then propose additional project staff as they see necessary to achieve the requirements outlined in the scope of work. A copy of the Project budget spreadsheets outlining all cost elements, including the final Project budget proposed by the firms, is included as Attachment D. The budget for the firms ranged from \$399,360 to \$399,887.

Although Kleinfelder proposed the lower weighted average hourly rate and scored higher for cost and price, CPOG's proposed hourly rates are comparable to the rates OCTA currently pays for public engagement during capital project construction and planning studies. Therefore, CPOG's proposed hourly rates are deemed fair and reasonable.

#### Procurement Summary

Based on the evaluation of written proposals, the firms' qualifications, the information obtained from the interviews, as well as cost and price, the evaluation committee recommends the selection of CPOG as the top-ranked firm to provide public outreach consulting services for the I-605/Katella Avenue Interchange Project. CPOG 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 2022-23 Budget, People and Community Engagement Division, Account No. 0017-7519-FM003-0ID.



**Summary**

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-2-3025 between the Orange County Transportation Authority and Costin Public Outreach Group, Inc., in the amount of \$399,887, for a three-year initial term with a two-year option term, to provide public outreach consultant services for the I-605/Katella Avenue Interchange Project.

**Attachments**

- A. Review of Proposals, RFP 2-3025 Public Outreach for Interstate 605/Katella Avenue Interchange Project
- B. Proposal Evaluation Criteria Matrix, RFP 2-3025 Public Outreach for Interstate 605/Katella Avenue Interchange Project
- C. Contract History for the Past Two Years, RFP 2-3025 Public Outreach for Interstate 605/Katella Avenue Interchange Project
- D. Orange County Transportation Authority Summary of Analysis, C-2-3025

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