



October 17, 2024

To: Legislative and Communications Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Agreement for 2026 Long-Range Transportation Plan Public Outreach Consultant Services

Overview

On June 20, 2024, the Orange County Transportation Authority released a request for proposals for public outreach services to support the upcoming 2026 Long-Range Transportation Plan. 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 services for the 2026 Long-Range Transportation Plan.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2295 between the Orange County Transportation Authority and Arellano Associates, LLC, in the amount of \$350,000, for a two-year initial term with one, one-year option term, to provide public outreach services for the 2026 Long-Range Transportation Plan.

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 updates the Long-Range Transportation Plan (LRTP) every four years as local input for the Southern California Association of Governments' Regional

Transportation Plan and Sustainable Communities Strategy. The LRTP reflects OCTA's current policies and commitments, and incorporates input from local jurisdictions, business leaders, community leaders, county residents, and transportation planning professionals to address future transportation needs. The general goal of the LRTP is 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-plus year forecast of available revenues, changing demographics, and any other significant trends.

OCTA's Public Outreach Department is responsible for public engagement and creating awareness for the LRTP. Public outreach activities include, but are not limited to, the development of handouts, fact sheets, infographics, e-newsletters, social media and web content, and execution of online surveys and mailings. The consultant will also assist with planning and implementing in-person and virtual stakeholder meetings, elected official roundtables, pop-up events, 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, disadvantaged and hard-to-reach communities will be identified, and engagement materials and surveys will be provided in multiple languages.

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 June 20, 2024, Request for Proposals (RFP) 4-2295 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on June 20 and June 26, 2024. A pre-proposal conference was held on June 27, 2024, with eight attendees representing five firms. Four addenda were issued to make available the pre-proposal conference registration sheet and presentation, handle administrative issues related to the RFP, as well as provide responses to written questions.

On July 22, 2024, five proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, People and Community Engagement, as well as Planning and Analysis 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 20 percent
- Cost and Price 25 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 a public outreach program. Staffing and project organization was weighted the highest at 30 percent as the project team had to demonstrate extensive expertise in providing public outreach-related services. Work plan was weighted at 20 percent to ensure the firm demonstrated an understanding of OCTA's requirements based on the scope of work. Cost and price was weighted at 25 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 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. After the interviews and the technical scores of the short-listed firms were finalized, the sealed price proposals of only the short-listed firms were then opened and shared with the evaluation committee and the cost and price score was factored into the overall proposal score for a maximum of 100 points.

On August 6, 2024, the evaluation committee reviewed the five 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)
Headquarters: Chino Hills, California
Project Office: Chino Hills, California

Barrios & Associates, LLC, doing business as Communications LAB
Headquarters: Orange, California
Project Office: Orange, California

On August 20, 2024, the evaluation committee conducted interviews with the short-listed firms. The interviews consisted of a presentation by each firm to demonstrate their 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 each firm's approach to producing the key deliverables specified in the scope of work, including the roles and contributions of core team members, anticipated challenges and how they plan to address them, their experience working with community-based organizations in Orange County, 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, 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, as well as cost and price, the evaluation committee recommends Arellano for consideration of contract award. The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

Arellano, founded in 1994 and headquartered in Chino Hills, California, has over 70 employees. The firm has demonstrated extensive expertise in public outreach for various transportation planning initiatives, including the Los Angeles County Metropolitan Transportation Authority's (LA Metro) Long Beach-East Los Angeles Corridor Mobility Investment Plan and the Los Angeles County Bicycle Master Plan Update for the Los Angeles County Department of Public Works. Additionally, Arellano has been the lead outreach consultant for several OCTA projects, including the 2022 LRTP, Mobility Hub Study, Orange County (OC) Connect, Interstate 5 (I-5) Environmental Outreach, and the Transportation Demand Management (TDM) Plan. The firm is currently managing outreach for OCTA's on-call planning studies and oversees multilingual business outreach for the OC Streetcar project. To support their outreach efforts, Arellano has partnered with ArrowGTP, which will assist with multicultural engagement, public outreach, media relations, and translation services. The firm received positive feedback from its references.

Communications LAB, established in 2013 and based in Orange, California, has 16 full-time employees and demonstrated strong experience providing public outreach services for transportation and infrastructure projects. The firm has worked on relevant projects including the I-5 South County Improvement Project, the Interstate 405 (I-405) Design-Build Project, and outreach efforts for LA Metro. The firm has also worked with clients such as the County of Orange, Port of Long Beach, and Metrolink. Communications LAB has experience in utilizing both traditional and digital outreach strategies and proposed a subcontractor, J Wallin Opinion Research, to assist in conducting scientific surveys and public polling. Additionally, to ensure inclusive outreach, the firm proposed multilingual outreach through its collaboration with Ko & Martin, focusing on Vietnamese, Korean, and Chinese communities. Communications LAB received positive feedback from its references.

Staffing and Project Organization

Arellano proposed a highly experienced project team specializing in public outreach and transportation planning studies. The team includes individuals who are currently supporting OCTA projects such as the OC Coastal Rail Resiliency Study, OC Mobility Hubs Study, and the TDM Plan. The proposed project manager has over 14 years of experience in community relations, program management, and diversity outreach, and has worked on key regional projects like the Interstate 710 South Corridor Task Force for LA Metro and the Valley Boulevard Multi-Modal Transportation Improvements Project for the City of Los Angeles. Additionally, Arellano's subcontractor, ArrowGTP, is proposed to assist with outreach to diverse communities. The proposed community liaison has eight years of experience in targeted stakeholder outreach, engagement, event planning, coordination, and program development. During the interview, the project team clearly outlined their availability, roles, and technical approach, demonstrating a strong understanding of both OCTA's outreach requirements and broader transportation initiatives.

Communications LAB proposed a team with relevant public outreach experience across multiple transportation projects. The proposed project manager has 15 years of experience in community outreach and project management, with experience working on the I-5 South County Improvement Project and the I-405 Design-Build Project. The proposed lead community liaison has five years of experience working on public outreach initiatives, particularly in multilingual campaigns targeting diverse communities. The team also includes key staff who have worked on past OCTA projects, such as the I-5 South County Improvement Project, showcasing familiarity with OCTA's outreach methods. During the interview, the project team discussed their understanding of public outreach

challenges, including reaching disadvantaged communities and addressing transportation equity concerns.

Work Plan

Arellano presented a comprehensive work plan that covered all elements of the scope of work. The firm detailed its approach to project management, including quality assurance, schedule management, and outreach strategies. Arellano proposed various outreach methods, such as public workshops, social media campaigns, geofencing, canvassing, virtual engagement tools, and online surveys. The firm also highlighted its in-house innovations team, which focuses on implementing new technologies, such as visual design software, virtual story mapping, and online comment forums to improve stakeholder engagement. Their work plan reflected a thorough understanding of OCTA's challenges, such as managing outreach fatigue and handling multiple projects simultaneously. During the interview, Arellano provided detailed responses on addressing these challenges, including plans for close collaboration with community-based organizations to ensure effective outreach to diverse and underserved communities, particularly targeting Vietnamese and Spanish-speaking groups.

Communications LAB submitted a work plan that outlined its approach to project management, digital and social media content, and outreach tactics. The firm emphasized its experience with utilizing virtual meeting rooms and online engagement tools, which were successfully used in recent projects with the Riverside Transit Agency. Communications LAB's proposal highlighted the use of experienced subcontractors, which enhances their capacity to deliver high-quality outreach and engagement. However, concerns were raised about whether the proposed survey strategy would sufficiently meet OCTA's requirement for effectively reaching and engaging a diverse range of communities. During the interview, the firm provided general responses and did not offer additional insight beyond the information already included in their proposal.

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. Arellano proposed the lower weighted average hourly rate. Therefore, Arellano'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 Arellano as the top-ranked firm to provide public outreach consulting services for the 2026 LRTP. 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 2024-25 Budget, People and Community Engagement Division, Account No. 0017-7519-A4461-118, and is funded through local funds.

Summary

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-4-2295 between the Orange County Transportation Authority and Arellano Associates, LLC, in the amount of \$350,000, for a two-year initial term with one, one-year option term to provide public outreach consulting services for the 2026 Long-Range Transportation Plan.

Attachments

- A. Review of Proposals, RFP 4-2295 2026 Long-Range Transportation Plan Public Outreach Consultant Services
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 4-2295 2026 Long-Range Transportation Plan Public Outreach Consultant Services
- C. Contract History for the Past Two Years, RFP 4-2295 2026 Long-Range Transportation Plan Public Outreach Consultant Services

Prepared by:



Marissa Espino
Section Manager II, Public Outreach
714-560-5607

Approved by:



Maggie McJilton
Executive Director,
People and Community Engagement
714-560-5824



Pia Veerapen
Director, Contracts Administration and
Materials Management
714-560-5619