



February 15, 2024

To: Legislative and Communications Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Agreement for Rideshare and Vanpool Marketing Services

Overview

On August 29, 2023, the Orange County Transportation Authority released a request for proposals for a firm to provide rideshare and vanpool marketing services. 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 Jovenville, LLC, doing business as We The Creative, as the firm to provide rideshare and vanpool marketing services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-3-2607 between the Orange County Transportation Authority and Jovenville, LLC, doing business as We The Creative, in the amount of \$616,667, to provide rideshare and vanpool marketing services for a two-year initial term with two, two-year option terms.

Discussion

The Orange County Transportation Authority (OCTA) serves as the county transportation commission (CTC) for Orange County. OCTA and the following CTCs form the Regional Rideshare Partnership:

- 1. Los Angeles County Metropolitan Transportation Authority
- 2. Riverside County Transportation Commission
- 3. San Bernardino County Transportation Authority
- 4. Ventura County Transportation Commission

The CTCs have been jointly promoting and providing regional rideshare services to employers since the Southern California Association of Governments (SCAG) ceased to provide these services in 2003. In this context, “rideshare” refers to all modes of transportation other than driving alone to work, including commuting to work by bus, train, carpool, vanpool, walking, and bicycling - all which reduce vehicles miles traveled and traffic congestion, and improve air quality.

Like other CTCs in the South Coast Air Basin, OCTA conducts marketing campaigns and promotions that encourage commuters to rideshare and help employers comply with the South Coast Air Quality Management District’s Rule 2202 - On-Road Motor Vehicle Mitigation Options. The rule provides employers of 250 or more employees with options to reduce mobile-source emissions generated from employee commutes to comply with federal and state Clean Air Act requirements.

OCTA’s current rideshare programs and services include the following:

- Perk Pass – discounted bus passes for employers
- Average Vehicle Ridership survey calculation and data analysis
- Metrolink’s Corporate Pass Program – discounted passes for employers
- Guaranteed Ride Home – provides employees who rideshare the opportunity to reimburse the cost of an emergency trip home
- Vanpool Program – promotes commuting as a group in a shared vehicle
- Active transportation safety education including collateral for electric bicycles and production and promotion of various videos
- Employer outreach to encourage rideshare program participation
- Employer marketing training workshops and networking meetings
- Marketing campaigns for Rideshare Week, Bike Month (including Bike to Work Week), and Dump the Pump
- Ride matching and vanpool formation services
- Rule 2202 compliance assistance

Since 2007, OCTA has also provided a vanpool program, known as the OC Vanpool Program, contracting with vanpool companies to provide commuters with a convenient and cost-effective transportation option. A vanpool consists of a group of four to 15 people who regularly commute to work in a shared vehicle. OCTA provides all marketing and customer outreach for the program in an effort to grow the vanpool count and miles reported.

With support from a consultant, OCTA conducts marketing campaigns, promotions, and outreach to achieve the following goals:

- Increase awareness of OCTA's rideshare programs and services
- Stimulate use of alternative transportation modes
- Grow ridesharing participation by commuters and employers
- Expand the vanpool program participation

Consultant Services

To assist with the development and implementation of promotion and marketing of both the Rideshare and OC Vanpool programs, OCTA requires consultant support to provide various marketing services to conduct marketing campaigns and promotions. Services include:

- Integrated strategic marketing plan development and campaign development
- Email, social media, and mobile marketing
- Digital and traditional media planning, buying, and optimization
- Diversity marketing and translation services
- Print and digital creative development, including website development, video production, and photography
- Production and printing services

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 August 29, 2023, Request for Proposals (RFP) 3-2607 was issued electronically on CAMM NET. The RFP was advertised in a newspaper of general circulation on August 29 and September 5, 2023. A pre-proposal conference was held on September 7, 2023, with eight attendees representing seven firms. Two addenda were issued to provide a copy of the pre-proposal registration sheets and respond to written questions.

On October 2, 2023, six proposals were received. A responsiveness evaluation was conducted on all proposals. This project was assigned a nine percent Disadvantaged Business Enterprise (DBE) goal. Three firms were found to be non-responsive for failure to demonstrate responsiveness to meet the DBE goal or demonstrate adequate good faith efforts in accordance with the Federal Transit Administration's regulations. Three proposals were determined to be responsive and eligible to continue in the evaluation process.

An evaluation committee consisting of OCTA staff from the Contracts Administration and Materials Management, Marketing and Customer Engagement, and Planning and Analysis departments, as well as an external evaluator from the Los Angeles County Metropolitan Transportation Authority, met to review all proposals received. The proposals were evaluated based on the following evaluation criteria and weightings.

- Qualifications of the Firm 25 percent
- Staffing and Project Organization 20 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 25 percent to ensure the firm has prior experience providing similar services. Staffing and project organization was weighted at 20 percent as the project team needed to demonstrate expertise related to marketing for rideshare and vanpool services. Staff assigned the highest weight to work plan to ensure the firm demonstrated a clear and detailed approach to marketing OCTA's rideshare and vanpool program. Cost and price was weighted at 25 percent to ensure OCTA receives competitive pricing for the services provided.

On October 17, 2023, the evaluation committee reviewed and discussed the three responsive proposals based on the evaluation criteria, and two firms were shortlisted and interviewed. The two firms are listed in alphabetical order as follows:

Firms and Location:

Jovenville, LLC, doing business as We The Creative (WTC)
Irvine, California

Loma Media (Loma)
San Diego, California

On October 26, 2023, 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 qualifications and respond to evaluation committee questions. Questions were asked relative to the qualifications and experience of the proposed project team's key personnel, innovative ideas for rideshare and vanpool marketing, and the

firm's approach to overcoming challenges for people attempting to rideshare and vanpool.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and made adjustments to the scores. However, WTC remained the higher-ranked firm with the higher overall score.

Based on the evaluation of written proposals and interviews, staff recommends WTC as the firm to provide rideshare and vanpool marketing services. The following is a summary of the proposal evaluation results.

Qualifications of the Firm

Founded in 1995, WTC has 28 years of experience in the creative marketing industry. The firm demonstrated direct relevant experience and capabilities in all aspects of the services requested, including a strong background in creative and design work. Their design samples were extremely impressive and helped them stand out from the other vendors. Additionally, WTC has provided similar services to public agencies and municipalities including the City of Anaheim, City of Lancaster, and Marin Transit. The firm has also worked with OCTA on various successful marketing projects including rideshare and vanpool. WTC received positive feedback from their references, which responded that they were satisfied with the firm's performance. WTC proposed a qualified list of subcontractors. The proposal demonstrated the firm's relevant past experience providing rideshare and vanpool marketing services.

Founded in 2001, Loma is a full-service marketing and communications agency. The firm demonstrated experience providing similar services to public agencies including Chicago Metra, New York City Transit Authority, the San Diego Association of Governments, and the United States Department of Transportation. The references provided by Loma reported that they were satisfied with the firm's performance, and Loma proposed a qualified list of subcontractors. The proposal demonstrated the firm's relevant past experience providing rideshare and vanpool marketing services.

Staffing and Project Organization

WTC's key personnel proposed for the project are qualified and have prior experience with rideshare and vanpool programs. The proposed chief creative officer has 28 years of experience in the advertising field and creative strategy, and the account manager has five years of experience. During the interview, the

team provided clear responses and addressed their expertise with providing marketing services for rideshare and vanpool programs.

Loma proposed a team with experience and qualified backgrounds suitable to performing the requirements of the scope of work. The proposed chief creative officer has over 30 years of experience, and the account manager has 21 years of experience. During the interview, the project team members discussed their qualifications and experience and provided clear responses to the evaluation committee's questions.

Work Plan

The work plan proposed by WTC addressed all the requirements identified in the scope of work and outlined the activities that would be undertaken in completing the services. The firm developed a "4D Approach" based on discovery, design, development, and delivery to meet the needs of delivering a successful marketing campaign. WTC also proposed to apply a unique brainstorming approach called "Boardstorming" to develop innovative ideas and address the challenges of marketing rideshare and vanpool programs. Furthermore, WTC provided excellent samples of past collateral for similar marketing campaigns, and the firm's conceptual designs demonstrated a comprehensive understanding of rideshare and vanpool program requirements. During the interview, WTC provided a detailed response on the firm's approach to overcoming challenges for people attempting to rideshare and vanpool, as well as innovative ideas for the rideshare and vanpool marketing program.

Loma's work plan addressed the requirements of the scope of work and the firm demonstrated an understanding of rideshare and vanpool programs. Loma proposed a combination of quantitative and qualitative research techniques to grow OCTA's rideshare and vanpool programs. The firm also employs a five-step sequential approach to address the requirements of the scope of work. Furthermore, Loma provided good samples of past collateral for similar marketing campaigns, and the firm's conceptual designs demonstrated an understanding of rideshare and vanpool program requirements. During the interview, the firm addressed its approach to overcoming challenges for people attempting to rideshare and vanpool, as well as innovative ideas for the rideshare and vanpool marketing program.

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 their relation to the lower weighted

average hourly rate. WTC proposed weighted average hourly rate was comparable to that of Loma and the OCTA project manager's independent cost estimate. Therefore, the pricing proposed by WTC is deemed fair and reasonable.

Procurement Summary

Based on the evaluation of the written proposal, the firm's qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of WTC as the top-ranked firm to provide rideshare and vanpool marketing services. WTC delivered a thorough and comprehensive proposal and an interview that was responsive to requirements of the RFP.

Fiscal Impact

The cost of the program is included in OCTA's Fiscal Year 2023-24 Budget. The program is funded with Congestion Mitigation and Air Quality grant funds in People and Community Engagement Division Account No.1841-7519-A2237-L75.

Summary

Staff is recommending the Board of Directors authorize the Chief Executive Officer to negotiate and execute Agreement No. C-3-2607 between the Orange County Transportation Authority and Jovenville, LLC, doing business as We The Creative, in the amount of \$616,667, to provide rideshare and vanpool marketing services for a two-year initial term with two, two-year option terms.

Attachments

- A. Review of Proposals, RFP 3-2607 Rideshare and Vanpool Marketing Services
- B. Proposal Evaluation Criteria Matrix (Short-Listed Firms), RFP 3-2607 Rideshare and Vanpool Marketing Services
- C. Contract History for the Past Two Years, RFP 3-2607 Rideshare and Vanpool Marketing Services

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