



RESOLUTION AWARDING THREE-YEAR PROFESSIONAL SERVICES CONTRACTS, WITH AN OPTION TO EXTEND FOR TWO ADDITIONAL ONE-YEAR PERIODS, TO CIVIC EDGE CONSULTING AND CONVEY, INC. IN A COMBINED AMOUNT NOT TO EXCEED \$300,000 FOR ON-CALL STRATEGIC COMMUNICATIONS, MEDIA AND COMMUNITY RELATIONS SERVICES, AND AUTHORIZING THE EXECUTIVE DIRECTOR TO NEGOTIATE CONTRACT PAYMENT TERMS AND NON-MATERIAL CONTRACT TERMS AND CONDITIONS

WHEREAS, The Transportation Authority has regular needs to communicate with the public, the media, policymakers, and key stakeholders in partner agencies and the private and non-profit sectors on a wide range of agency and project-specific matters; and

WHEREAS, Given the wide range of desired proficiencies and experience, the amount and complexity of the Transportation Authority's work program, and occasional conflicts of interest or availability that arise for specific efforts, there is a need for broad and deep access to communications, media, and community relations skills; and

WHEREAS, Staff propose to contract with two consultant teams with whom the Transportation Authority may call upon on a task order basis; and

WHEREAS, On November 1, 2018, the Transportation Authority and the Treasure Island Mobility Management Agency (TIMMA) issued a Request for Qualifications (RFQ) on-call strategic communications, media and community relations services to support the Transportation Authority's and TIMMA's work program over the next three years; and

WHEREAS, The Transportation Authority received ten Statements of Qualifications in response to the RFQ by the due date of December 5, 2018; and

WHEREAS, A selection panel comprised of San Francisco Environment and Transportation



Authority staff evaluated the Statements of Qualifications based on qualifications and other criteria identified in the RFQ and interviewed six firms between January 8-9, 2019; and

WHEREAS, Based on the competitive process defined in the evaluation criteria of the RFQ document, the selection panel recommended awarding contracts to the two highest-ranked firms: Civic Edge Consulting and Convey, Inc.; and

WHEREAS, The selection panel recommended that the Transportation Authority and TIMMA both award contracts to the same two firms as the agencies' share communications staff resources which will enhance staff efficiency in issuing task orders and supporting project needs; and

WHEREAS, The Transportation Authority's portion of the scope of work described in the RFQ is anticipated in the Transportation Authority's adopted Fiscal Year 2018/19 work program and budget through relevant projects and studies, and sufficient funds will be included in future fiscal year budgets to cover the cost of these contracts; and

WHEREAS, The professional services contracts will be funded by a combination of federal Surface Transportation Planning grants, federal and/or state grants from Caltrans and the Metropolitan Transportation Commission, local agency contributions and Prop K sales tax funds; and

WHEREAS, At its January 23, 2019 meeting, the Citizens Advisory Committee considered the subject and unanimously adopted a motion of support for the staff recommendation; now, therefore, be it

RESOLVED, That the Transportation Authority hereby awards three-year professional services contracts, with an option to extend for two additional one-year periods, to Civic Edge Consulting and Convey, Inc. in a combined amount not to exceed \$300,000 for on-call strategic communications, media and community relations services; and be it further

RESOLVED, That the Executive Director is hereby authorized to negotiate contract payment terms and non-material contract terms and conditions; and be it further



RESOLVED, That for the purposes of this resolution, “non-material” shall mean contract terms and conditions other than provisions related to the overall contract amount, terms of payment, and general scope of services; and be it further

RESOLVED, That notwithstanding the foregoing and any rule or policy of the Transportation Authority to the contrary, the Executive Director is expressly authorized to execute agreements and amendments to agreements that do not cause the total agreement value, as approved herein, to be exceeded and that do not expand the general scope of services.

Attachment:

1. Scope of Services

Attachment 1

Scope of Services

The Transportation Authority has regular needs to communicate with policymakers, the media, key stakeholders, the general public, partner agencies and the private and non-profit sectors, on a wide range of agency and project-specific matters. The below areas of expertise and example task types are representative of the Transportation Authority needs in the coming three years – additional undetermined task types are anticipated to be needed and not all task types listed below will necessarily be produced under this contract in the next three years. Example tasks include: 1) agency-wide outreach/communications, and 2) project-specific outreach/communications.

Areas of Expertise

In seeking assistance with communications, outreach and engagement efforts, the Transportation Authority seeks to advance the following goals and objectives:

- Raise awareness about our roles, purpose, and operations to the general public;
- Provide consistent and easy-to-understand public communication regarding our work;
- Maintain a common communications voice and strengthen quality assurance/quality control, while maintaining the flexibility for rapid responses;
- Collaborate with the community to develop shared visions and action plans for improving transportation in San Francisco; and
- Engage with, and solicit input from, policymakers, the general public, and stakeholder groups in our initiatives and projects, and in particular develop methods to obtain meaningful input from hard-to-reach-population segments.

To achieve these goals, we will need expertise in the following communications and outreach areas:

1. Strategic Communications
2. Message Framing
3. Public Relations
4. Media Relations
5. Public Outreach
6. Marketing
7. Public Opinion Surveys/Market Research/Focus groups
8. Crisis Communications
9. Graphic Design
10. Meeting Facilitation and/or Design Thinking
11. Event planning
12. Photography/videography
13. Online and/or Technology Engagement/Outreach Tools (examples could include webinars, online data visualization tools, online engagement tools, telephone town halls, etc.)

Attachment 1

Scope of Services

14. Translation (both verbal and written). Translation services must also include interpretation to culturally relevant terms.

Details of Scopes of Work

We anticipate that Task Orders will be developed to address the following areas of work during the duration of the contract(s):

A. Agency-wide Outreach/Communications

1. Media/Public Relations Services

- a. Support communications with the media, including development of communications materials
- b. Demonstrate experience with all media formats, including print/radio/television from local to national level, bloggers, advertising, social media, etc.
- c. Demonstrate experience placing media stories/opinion-editorials/letters to the editor

Deliverables: press list and kit; media plan; media advisories; press kit development and distribution; press events; log of media hits

2. Opinion/Market Research

- a. Administer opinion research such as focus groups, polls, surveys conducted via a range of methodologies (intercept, mail, phone, online) or other types of opinion research as needed

Deliverables: focus group/polling results; development and administration of focus groups/polling

3. Events

- a. Support communications with the planning and execution of events, including ribbon cutting ceremonies, press events, networking events, celebratory events, etc.

Deliverables: event plan; invitation list; event logistics including catering/food/beverage service/entertainment

4. Branding, Messaging, Images

- a. Develop messaging/branding/images/graphics to support Transportation Authority initiatives

Deliverables: messaging, branding, and images that support agency initiatives

5. Relationship Building and Management Support

- a. Track partner agency and policymaker initiatives and suggest ways for the Transportation Authority to provide cross support or to collaborate on relevant initiatives
- b. Facilitate meetings with key groups/individuals related to the Transportation Authority's initiatives

Deliverables: proposals on communications initiatives/events that advance Transportation Authority goals and align with relevant initiatives

Attachment 1

Scope of Services

6. Administration and Reporting

- a. Project phone calls/in-person meetings, including agendas and meeting minutes
- b. Management of overall project tasks and invoice preparation

Deliverables: meeting notes; progress updates; project reporting and monthly invoices by task

B. Project-Specific Outreach/Communications

1. Communications Plan Development

- a. Develop and implement robust outreach and communications strategies - which will include strategies to reach non-English speaking and/or other hard to reach communities - to support advancement of agency plans, programs or efforts
- b. Be proficient in taking complicated technical material and translating it into readily digestible and publicly understandable concepts
- c. Identify innovative public engagement and involvement methods and processes
- d. Identify strategies for developing projects and recommendations that gain the support of/respond to the needs of all project stakeholders
- e. Develop and/or review communications collateral and/or plans

Deliverables: draft and final communications plans; draft and final versions of communications collateral

2. Communications Plan Execution

- a. Implement outreach plan, working with any combination of the project team, communications staff and potentially outside agencies reporting to the Transportation Authority
- b. Secure venues for meetings
- c. Reach out to relevant audiences online and in-person to participate in meetings and events
- d. Oversee logistics to arrange for food/beverage, child care, or other needed services at public events
- e. Staff meetings, open houses or other events as appropriate
- f. Arrange for translation of materials or arrange for live translation services
- g. Arrange for notification to the public of open house or other public outreach events

Deliverables: venues secured for meetings with appropriate services provided; translation services; advance public notification of events

3. Administration and Reporting

- a. Project phone calls/in-person meetings, including agendas and meeting minutes
- b. Management of overall project tasks and invoice preparation

Deliverables: meeting notes; progress updates; project reporting and monthly invoices by task



Memorandum

Date: January 16, 2019
To: Transportation Authority Board
From: Eric Young – Senior Communications Officer
Subject: 01/29/19 Board Meeting: Award Three-Year Professional Services Contracts, with an Option to Extend for Two Additional One-Year Periods, to Civic Edge Consulting and Convey, Inc. in a Combined Amount Not to Exceed \$300,000 for On-Call Strategic Communications, Media and Community Relations Services

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| <p>RECOMMENDATION <input type="checkbox"/> Information <input checked="" type="checkbox"/> Action</p> <ul style="list-style-type: none"> • Award three-year professional services contracts, with an option to extend for two additional one-year periods, to Civic Edge Consulting and Convey, Inc. in a combined amount not to exceed \$300,000 for on-call strategic communications, media, and community relations services • Authorize the Executive Director to negotiate contract payment terms and non-material terms and conditions <p>SUMMARY</p> <p>We are seeking consultant services to provide on-call strategic communications, media, and community relations services. The Transportation Authority has regular needs to communicate with policymakers, the media, key stakeholders, the general public, partner agencies, and the private and non-profit sectors on a wide range of agency and project-specific matters. We issued a Request for Qualifications (RFQ) in November. By the proposal due date, we received 10 Statements of Qualifications. Following interviews with six firms, the multi-agency selection panel recommend award of contracts to the two highest-ranking firms: Civic Edge Consulting and Convey, Inc. The establishment of multiple contracts with consultant teams will enable the Transportation Authority to enlist the services of a broad range of communications and outreach consultants on an on-call, as-needed basis.</p> | <ul style="list-style-type: none"> <input type="checkbox"/> Fund Allocation <input type="checkbox"/> Fund Programming <input type="checkbox"/> Policy/Legislation <input type="checkbox"/> Plan/Study <input type="checkbox"/> Capital Project Oversight/Delivery <input type="checkbox"/> Budget/Finance <input checked="" type="checkbox"/> Contract/Agreement <input type="checkbox"/> Other: <hr/> |
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DISCUSSION

Background.

The Transportation Authority has regular needs to communicate with policymakers, the media, key stakeholders, the general public, partner agencies, and the private and non-profit sectors on a wide range of agency and project-specific matters. We initiated a procurement process seeking on-call strategic communications, media, and community relations services to support the Transportation Authority’s work program. Our current on-call communications contracts, with one team led by Civic

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Edge Consulting (formerly Barbary Coast Consulting) and the other by Davis & Associates Communications, Inc. are approaching the end of their contract term.

In seeking assistance with communications, outreach, and engagement efforts, we strive to advance the following goals and objectives:

- Raise awareness about the our roles, purpose, and operations to the general public;
- Provide consistent and easy-to-understand public communication regarding the our work;
- Maintain a common communications voice and strengthen quality assurance/quality control, while maintaining the flexibility for rapid responses;
- Collaborate with the community to develop shared visions and action plans for improving transportation in San Francisco; and
- Engage with, and solicit input from, policymakers, the general public, and stakeholder groups in our initiatives and projects, and in particular, develop methods to obtain meaningful input from hard-to-reach-population segments.

The scope of services, included as Attachment 1, covers two major areas of work: agency-wide outreach and communications and project-specific outreach and communications.

Given the wide range of desired proficiencies and experience; the amount and complexity of the Transportation Authority's work program; and occasional conflicts of interest or availability that arise for specific efforts, there is a need for broad and deep access to communications, media, and community relations skills. Therefore, we propose to contract with two consultant teams with whom the Transportation Authority may call upon on a task order basis. This also is intended to increase competition and allow for improved responsiveness (e.g., during times of peak demand). We have used this type of arrangement for our previous on-call communications contracts, and found it to be beneficial to the Transportation Authority's work program.

Procurement Process.

The Transportation Authority and TIMMA issued a joint RFQ for on-call strategic communications, media, and community relations services on November 1, 2018. We hosted a pre-proposal conference at our offices on November 14, which provided opportunities for small businesses and larger firms to meet and form partnerships. 22 firms attended the conference. We took steps to encourage participation from small and disadvantaged business enterprises, including advertising in six local newspapers: the San Francisco Chronicle, San Francisco Examiner, the Small Business Exchange, Nichi Bei, the Western Edition, and the San Francisco Bayview. We also distributed the RFQ and questions and answers to certified small, disadvantaged, and local businesses; Bay Area and cultural chambers of commerce; and small business councils.

By the due date of December 5, 2018, we received 10 Statements of Qualifications in response to the RFQ. A selection panel comprised of Transportation Authority and San Francisco Environment staff evaluated the proposals based on qualifications and other criteria identified in the RFQ, including the proposer's understanding of project objectives, technical and management approach, and capabilities and experience. The panel selected six firms to interview between January 8 and 9, 2019. Based on the competitive process defined in the RFQ, the panel recommends that the Board award contracts to the

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two highest-ranked firms: Civic Edge Consulting and Convey, Inc. The two highest-ranked teams provide a strong set of skills, specialists, and relevant project experience. Civic Edge Consulting has a proven track record of performance in all on-call task areas and a deep bench of experienced sub-consultants, while Convey demonstrates strong capabilities to execute creative communications to support our agency's work in emerging mobility and pricing.

The selection panel recommends that the Transportation Authority and TIMMA both award contracts to the same two firms, as both agencies share communications resources. Awarding contracts to the same on-call communications consultant teams will enhance staff efficiency in issuing task orders and supporting project needs. The contract award for TIMMA's portion of the contract will be considered by the TIMMA Committee at its next scheduled meeting.

We plan to use federal funds to cover a portion of this contract and have adhered to federal procurement regulations. We established a Disadvantaged Business Enterprise (DBE) goal of 17% for this contract, accepting certifications by the California Unified Certification Program. Both teams have made commitments to exceed the DBE goal. The Civic Edge Consulting team includes 21.5% DBE participation from four San Francisco-based subconsultants: African-American-owned firm JBR Partners, Inc., African-American-owned firm RDJ Enterprises, Hispanic-owned firm Jungle Communications, Inc., and Women-owned firm ACE Mailing Corporation. The Convey, Inc. team includes 40% DBE participation through Convey being a Women-owned firm.

The selected consultant teams will remain eligible for consideration for task order negotiation on an as-needed basis for the initial three-year term, plus two optional one-year extensions. While the Transportation Authority intends to engage pre-qualified firms based on capabilities, experience, and availability, no selected team is guaranteed a task order.

FINANCIAL IMPACT

The scope of work described in the RFQ is anticipated in the Transportation Authority's adopted Fiscal Year 2018/19 work program and budget through relevant projects and studies. Budget for these activities will be funded by a combination of federal Surface Transportation Planning grants, other federal and/or state grants from Caltrans and the Metropolitan Transportation Commission, local agency contributions, and Prop K sales tax funds. The first year's activities are included in the Transportation Authority's adopted Fiscal Year 2018/19 budget and sufficient funds will be included in future fiscal year budgets to cover the cost of these contracts.

CAC POSITION

The CAC unanimously adopted a motion of support for this item at its January 23, 2019, meeting.

SUPPLEMENTAL MATERIALS

Attachment 1 – Scope of Services

Attachment 2 – Past Task Order Assignments (2014 – 2019)

Attachment 2

On-Call Strategic Communications, Media and Community Relations Services Past Task Order Assignments (2014 – 2019)

| Prime Consultant | Task Order Description | Amount |
|---|---|------------------|
| Civic Edge Consulting (formerly Barbary Coast Consulting) | Overall Communications ¹ | \$257,414 |
| | Geary Corridor Bus Rapid Transit | \$218,975 |
| | Graphic Design Support | \$74,841 |
| | BART Travel Incentives Program | \$65,000 |
| | Vision Zero Ramps Phase II | \$52,980 |
| | Treasure Island Mobility Management Agency | \$32,956 |
| | Geneva-Harney Bus Rapid Transit | \$28,675 |
| | Quint-Jerrold Connector Road | \$6,472 |
| | San Francisco Parking Supply and Utilization Study | \$1,531 |
| Total Task Orders Awarded to Civic Edge Consulting | | \$738,844 |
| Davis & Associates Communications, Inc. | Treasure Island Mobility Management Agency | \$67,901 |
| | San Francisco Transportation Plan | \$29,178 |
| | Overall Communications ¹ | \$20,000 |
| | 2019 Proposition K / 5-Year Prioritization Program Update | \$17,536 |
| | Communications Assessment | \$16,748 |
| | U.S. 101/I-280 Managed Lanes | \$15,000 |
| | Chinatown Community-Based Transportation Plan | \$11,417 |
| Total Task Orders Awarded to Davis & Associates Communications, Inc. | | \$177,780 |
| Total Task Orders Awarded to Date | | \$916,624 |

¹ Overall communications encompasses activities such as overall image development and branding of the Transportation Authority and creating communication materials, including translating documents to comply with Title VI requirements. In addition, consultant teams monitor legislative, community and media activity for various Transportation Authority projects and provide comprehensive support services for Transportation Authority initiatives not covered by separate task orders.

Attachment 2

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| Total Amount Awarded to DBE Firms | \$299,737 |
| Total Contract Amount | \$960,800 |