



Questions & Answers

Request for Qualifications for On-Call Strategic Communications, Media and Community Relations Professional Services

Date: November 20, 2018

To: Interested Firms and Individuals

From: Eric Young, Senior Communications Officer

Subject: Request for Qualifications to Provide On-Call Strategic Communications, Media and Community Relations Professional Services (RFQ 18/19-05)

The San Francisco County Transportation Authority (Transportation Authority) and the Treasure Island Mobility Management Agency (TIMMA) received the following questions in italics submitted by 5:00 p.m. on November 15, 2018.

1. Has a budget been established for these contracts, with funds encumbered, and what would the total budget be?

The Transportation Authority and TIMMA have each budgeted \$300,000 for the initial three-year contract term.

2. Are you able to share an estimate of how many respondents are submitting Statements of Qualifications (SOQs)? How will the decision be weighted?

We do not know how many respondents will submit. The pre- and post-evaluations will be conducted based on the following criteria, described in further detail in Section VI of the RFQ:

- Respondent Information and Understanding of Project Objectives (30 points)
- Technical and Management Approach (35 points)
- Capabilities and Experience (35 points)

3. Would you consider requiring the hypothetical scenarios under Section V only for respondents that are brought in for interviews?

We have to keep the requirements the same for all applicants and therefore require submissions to both hypotheticals for all respondents.

4. What is the best way for a subconsultant to make itself visible to a potential prime consultant? Is there a list of potential prime consultants on the Transportation Authority's website?

Attending the pre-response conference is the best way to network with potential primes consultants. For subconsultants unable to attend the conference, the sign-in sheet is posted on our website at <https://www.sfcta.org/doing-business-us/available-contracting-opportunities>. We are not aware of which potential prime consultants will submit SOQs.

5. We are currently certified as a Women Business Enterprise (WBE) by the California Public Utilities Commission. Would the Transportation Authority accept this certification in lieu of the Disadvantaged Business Enterprise (DBE) certification? If not, would a submitted DBE application that has a pending status be acceptable? Also, what would happen in the event that the DBE application was ultimately rejected but our team was awarded the contract?

Unfortunately, due to the funding sources for this contract we cannot accept WBE certification in lieu of DBE certification. Under Section VII of the RFQ, it states that DBE firms must be certified through the California Unified Certification Program by the SOQ due date, so we cannot accept pending applications. Respondents are not automatically disqualified if they do not meet the RFQ's 17% DBE goal. All respondents are required to complete *Exhibit 15-H, DBE Information - Good Faith Efforts* regardless if they meet the DBE goal or not. If they do not meet the DBE goal, we will evaluate the Good Faith Effort documentation and determine if respondents have taken all necessary and reasonable measures to achieve the DBE contract goal, in which case a contract may still be awarded.

6. Are pass-through expenses inclusive in the contract budget? For the Informal Request for Proposals (IRFP) process, do the task orders have separate budgets?

Yes, the overall contract budget includes pass-through expenses, such as direct expenses. For the IRFP process, there are separate project budgets established for each task order which count against the contract budget.

7. Is there a DBE goal established for each task order?

The 17% DBE goal is for the overall contract. There are not separate DBE goals for each task order. The 17% DBE goal should be a target for each task order but is not a requirement.

8. Is the 17% DBE goal a requirement for the contract?

It is an agency goal for these contracts. We monitor DBE performance on a regular basis so if the 17% goal is not being met we will request that the prime consultant take steps to increase DBE performance or document sufficient good faith effort measures.

9. If a prime consultant is a DBE would they meet the 17% DBE goal or is a DBE subconsultant also required?

Yes, as long as the prime consultant is performing at least 17% of the work they would be achieving the DBE goal. The Transportation Authority is a separate legal entity from the City and County of San Francisco and does not set subcontracting goals separate from the DBE goal. For this procurement we are following Caltrans' DBE guidelines in accordance with Code of Federal Regulations Title 49 Section 26 (49 CFR 26).

10. What would the ideal team structure look like?

Starting on page 5 of the RFQ there are 14 different areas of expertise listed. The ideal team would be competent in all 14 of these areas. There is no preference to the number of subconsultants used or the size of a team.

11. Would the Transportation Authority prefer to have two teams on-call under this contract?

Ideally we would select more than one team, but it depends on the quality and number of SOQs we receive. The previous iteration of this procurement received nine SOQs and two teams were awarded contract.

12. Can you discuss the previous consultants under contract for these services? Can you share the names of the firms currently under contract?

We have had contracts with Barbary Coast Consulting, which is now Civic Edge Consulting, for on-call strategic communications, media and community relations professional services since 2006. We last re-procured for these services in 2014 and awarded two contracts, one to Civic Edge Consulting and another one to Davis & Associates Communications.

13. Is the scope of services for this RFQ different from the previous iteration of this procurement?

There are a few items that have been added to the contract scope: message framing, marketing, design thinking, and technology engagement/outreach tools. Most of the Treasure Island scope of work is new as well, and having two separate contracts with the Transportation Authority and TIMMA is a new approach. We've also hired communications staff in the last few years that might change the needs for communications consultants from the previous procurement.

14. For the task order process, will you have the firms on the on-call bench compete against each other to submit mini proposals to be awarded the task order?

Depending on the scope and budget of the task order, we may go through the IRFP, or mini bid, process. If multiple teams are qualified in a given area, we may request all teams to submit proposals for task order negotiations. However, for more limited scopes, budgets and/or limited periods, the task order may be directly assigned to a firm on the bench, subject to negotiations.

15. Is the contract budget \$300,000 per agency?

Yes, \$300,000 is budgeted from the Transportation Authority and \$300,000 from TIMMA.

16. If a task order is assigned to one of the firms, how would the firm be chosen?

Generally, we would decide based on the scope of work involved and how it matches the strengths of either firm, however it could also depend on a firm's capacity or conflicts of interest.

17. At this stage, do you have an idea of how the interviews will be structured? Would they include the hypothetical scenarios?

We are still finalizing the interview format, but yes the hypotheticals would be discussed to some degree to provide elaboration of the SOQs.

18. If a firm is certified as a Local Business Enterprise (LBE), are they automatically also a DBE? Or how are they different?

No LBEs are not automatically DBEs. For most non-federally funded procurements the Transportation Authority accepts LBE certifications which are available for businesses that meet certain location and other requirements. As the Transportation Authority and TIMMA may receive federal funds for this contract, a DBE means a for-profit small business owned and controlled by a socially and economically disadvantaged person(s) as defined in Title 49, CFR Part 26.5. DBEs must be certified through the California Unified Certification Program by the SOQ due date. LBEs, small business enterprises (SBEs), and firms with other certifications are still encouraged to participate.

19. Could a prime consultant on the on-call bench be a certified DBE?

Yes, a prime consultant on the on-call bench could be a DBE. Note that no prime consultant on the bench is guaranteed a task order and not every subconsultant on a team is required to be used on a task order. When responding to an IRFP, prime consultants should consider listing only the subcontractors that would be most relevant to the specific task order.

20. The RFQ stated that there were options for the three-year contract term for two additional 1-year extensions. The RFQ states that the budgets for those one-year extensions would be determined by future Transportation Authority and TIMMA budgets. Do you have any idea what those amounts might be?

The \$300,000 budget for each contract is for the initial 3-year term. The one-year contract extensions, if exercised, would be based on the expected scope of work for that year and available budget, but generally they have equaled the average amount per year from the initial 3-year term, which in this case would be approximately \$100,000.

21. Have the contract budgets with the current consultants been fully exhausted?

Yes.

22. Has the budget for these contracts been encumbered for the initial three-year terms?

The first year's activities for these contracts have been included in the Transportation Authority and TIMMA's Fiscal Year 2018/19 adopted budgets. Sufficient funds will be included in future year budgets for the remaining activities.

23. The RFQ state that the agency would favor teams that are local and are familiar with San Francisco transportation projects. Would you consider teams that are comprised of both Northern California and Southern California staff?

It would depend on the SOQ and corresponding team structure. We strongly prefer having a prime consultant with a local presence that can easily access local areas of outreach and have a physical presence when needed.

24. The scope of work mentions outreach to organizations and agencies, are there any particular community organizations or public agencies that you tend to target? Do you have a list?

Most of our outreach efforts are to the general public and specific stakeholders based on a project area, and typically do not include partner agencies or general organizations.

25. Will there be a lot of in-person meetings? Is there any opportunity for web conferencing for those meetings?

Generally, we hold a lot of meetings by phone with teams on the on-call bench. There are times when it is necessary to conduct in-person meetings during a critical stage of outreach and a physical presence is definitely needed to help execute the plan.

26. The scope of services appears to be highly strategic with some implementation responsibilities as well. In terms of actual meetings, do you tend to staff your own outreach meetings? Do you ever rely on the on-call consultants to conduct outreach meetings?

It is on a case by case basis. The communications team conducts its own outreach meetings, often with help from the project manager or other agency staff; but in some instances, the on-call consultants are needed to conduct events or attend to help amplify the agency's voice.

27. How many outreach events do you typically hold each year?

Outreach events can tend to be intense and therefore a series of outreach meetings may be needed for a particular project. The past few years we have had approximately 25 events per year just for Transportation Authority projects, which includes open houses, Sunday Streets, pop-ups in particular neighborhoods, quick polling/intercept surveys, etc. We anticipate this number to increase with the Treasure Island work in the coming years.

28. Does the Transportation Authority have established design guidelines or standards that you would expect the selected consultants to follow for outreach materials?

Yes, we have a style guide and would share that with the selected consultant(s) when asking them to produce materials.

29. Regarding translations, do you have thresholds or guidelines for when you believe that translation is essential? Or some type of guide for determining when you would insist that these services are provided?

We do not currently have written guidelines for translation and would provide guidance to the selected consultants when materials are to be translated into specific languages. We are interested in online translation outreach on our website as well. Our most frequent needs for translation are for Spanish and Chinese.

30. For the hypothetical scenarios, do you expect the size of the agency's communications staff to stay the same or to increase?

Respondents should assume that the agency will have the same communications staffing for 2019 as present, which is two full-time staff. The agency would likely also have other staff involved in outreach as well, depending on the need, including project managers and others such as administrative and interns.

31. How will the contract budget be split between the Transportation Authority and TIMMA?

The Transportation Authority and TIMMA adopt separate budgets through each agency's respective Board. Each agency has budgeted \$300,000 for their respective scope of work for the initial 3-year term.

32. Is there a budget amount for the first year of work?

For the first year \$100,000 has been included in each agency's budget.

33. Would the task orders come out of each agency's budget?

Yes, we anticipate that there will be several task orders that will come out of each agency's contract budget.

34. Regarding the digital and technology engagement portion of the scope, are you planning on using your own platform, or are you expecting the selected consultants to develop applications?

We do not have our own platform so we look to external applications or platforms for that, but do not necessarily expect the consultants to develop applications. We would expect some sort of commercially available platform that could either interact with our website or could operate separately.

35. What is the file size limit for email submittals? Some servers max at 15 megabytes (mb), others 25mb.

Our server limit for receiving emails is 50mb. If you have an issue with your submission email, please document the issue and reach out to the RFQ contact prior to the SOQ deadline.

36. Do the references requested in Section V.4.b. count towards the SOQ page limit?

Yes, references do count against the 20-page SOQ limit, however they do not need to be included in a specific order of the SOQ.

37. Will the Transportation Authority accept cost proposals that provide estimates for the overarching areas of work (e.g. "A. Transportation Authority Agency-wide Outreach/Communications") and the two hypothetical scenarios rather than detail each of the sub-areas of work? Please provide any specifics for what is requested for a complete cost proposal.

The cost proposal does not need to include estimates for the overarching areas of work or the sub-areas of work. As noted under Section V.5. regarding cost, submittals are required to include Exhibit 10-H - Sample Cost Proposal. The cost proposal must include a budget comprised of a matrix with columns for hourly rates, classification, and name for all personnel and/or sub-consultants involved for the work described in Section IV. The cost proposal must be presented in the applicable format for the method of payment (see Exhibit 10-H) for the prime and all subconsultants and must contain a breakdown of all cost components to include: unloaded labor base rate, other direct costs, indirect cost rate, escalation (not to exceed 3% annually) and net fee.

Additionally, for the two hypothetical scenarios, please include an actual financial cost estimate and budget for each hypothetical, including a matrix with staff names, classifications, hourly rates, level of effort, and any direct expenses.

38. May we include information in tables as part of the 20 pages of the RFQ? If so, may we use a font size less than 12pt in the tables?

Yes tables and other graphics are acceptable. A smaller font is acceptable in tables or graphics but it must be reasonably legible.

For more information regarding the RFQ, visit the Transportation Authority's website: www.sfcta.org/contracting.