



# Memorandum

**Date:** June 21, 2018  
**To:** Transportation Authority Board  
**From:** Eric Young – Senior Communications Officer  
**Subject:** 07/10/18 Board Meeting: Approve a Three-Year Professional Services Contract with Civic Edge Consulting in an Amount Not to Exceed \$150,000 for Strategic Communications, Media and Community Relations Services for the ConnectSF Program

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| <p><b>RECOMMENDATION</b>    <input type="checkbox"/> Information    <input checked="" type="checkbox"/> Action</p> <ul style="list-style-type: none"> <li>• Approve a three-year professional services contract with Civic Edge Consulting in an amount not to exceed \$150,000 for strategic communications, media and community relations services for the ConnectSF Program</li> <li>• Authorize the Executive Director to negotiate contract payment terms and non-material terms and conditions</li> </ul> <p><b>SUMMARY</b></p> <p>We are seeking consultant services to provide strategic communications, media and community relations for the ConnectSF Program, which is a multi-agency, collaborative, long-range planning process to build an effective, equitable, and sustainable transportation system for San Francisco’s future. We issued a Request for Proposals (RFP) in May. By the proposal due date, we received four proposals. Following interviews with three firms, the review panel recommended Civic Edge Consulting to provide the requested services.</p> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Fund Allocation</li> <li><input type="checkbox"/> Fund Programming</li> <li><input type="checkbox"/> Policy/Legislation</li> <li><input type="checkbox"/> Plan/Study</li> <li><input type="checkbox"/> Capital Project Oversight/Delivery</li> <li><input type="checkbox"/> Budget/Finance</li> <li><input checked="" type="checkbox"/> Contract/Agreement</li> <li><input type="checkbox"/> Other:</li> </ul> <hr/> |
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**DISCUSSION**

**Background.**

The Transportation Authority is collaborating with the San Francisco Municipal Transportation Agency (SFMTA) and the San Francisco Planning Department to facilitate the ConnectSF program. Phase 1 of ConnectSF has defined a 50-year vision of San Francisco’s future that represents San Francisco’s goals and aspirations as a city within the larger Bay Area. The vision will be used as a framework for future studies related to transportation and land use planning in San Francisco and constitutes ConnectSF’s first phase of work. The vision is available on [connectsf.org/about/components/vision](http://connectsf.org/about/components/vision).

Phase 2 of ConnectSF, now underway, involves several major efforts that support the transportation vision. Those efforts and the time frames in which they are anticipated to take place include: the Transportation Needs Assessment (2018), Transportation Network Development for the San Francisco Transportation Plan (2018), Transit Corridors Study (2018-19) and Streets and Freeways

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Study (2018-19). The outcome of Phase 2 will be a prioritized list of projects and strategies that are needed to move the city towards meeting the goals and objectives agreed upon in the Phase 1 Vision. Phase 3 of ConnectSF will include a new Transportation Element of the City's General Plan and an update to the countywide transportation plan or San Francisco Transportation Plan (SFTP 2050). Outreach for Phase 3 will be a subsequent effort and not part of the subject contract.

Given the ConnectSF vision's emphasis on equity and diversity, it is critical that communications and outreach for the program reach the broadest audience possible. Program staff are highly interested in engaging people of color, people with low incomes, persons with disabilities, and other vulnerable populations, as well as non-governmental organizations that support these communities. The above studies listed are complex and different from each other. Yet, they are tied together by the ConnectSF vision goals and objectives and time horizon (2050). We are seeking consultant services to help all participating agencies devise effective ways of communicating to the public, community benefit organizations, elected leaders and others in a way that is seamless and that communicates why the studies are important and why people should be engaged.

#### **Procurement Process.**

We issued a RFP for strategic communications, media and community relations services on May 4, 2018. We hosted a pre-proposal conference at the Transportation Authority's offices on May 16, which provided opportunities for small businesses and larger firms to meet and form partnerships. Twenty-two 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 Examiner, the San Francisco Bay View, Nichi Bei, the Small Business Exchange, the Western Edition and the San Francisco Bayview, as well as on LinkedIn. We also distributed the RFP 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 June 5, 2018, we received four proposals in response to the RFP. A selection panel comprised of Transportation Authority, San Francisco Planning Department and San Francisco Municipal Transportation Agency staff evaluated the proposals based on qualifications and other criteria identified in the RFP, including the proposer's understanding of project objectives, technical and management approach, and capabilities and experience. The panel selected three firms to interview on June 19. Based on the competitive process defined in the RFP, the panel recommends that the Board award the contract to the highest-ranked firm: Civic Edge Consulting.

The panel unanimously agreed that Civic Edge Consulting distinguished itself through a number of criteria. The assembled team has a breadth of capabilities, including project management, grassroots outreach, communications, and digital organizing skills. The team has recent experience coordinating across agencies through the Vision Zero initiative. The team also stood out for its experience working on long-term planning efforts including Plan Bay Area 2040. The team's strong references and awareness of transportation and land use issues contributed to an overall strong proposal. Team members have many years of experience and have worked jointly or independently for clients including the San Francisco Planning Department, Office of Economic and Workforce Development, Metropolitan Transportation Commission, and San Francisco Municipal Transportation Agency, among others.

We established a Disadvantaged Business Enterprise (DBE) goal of 14% for this contract. Proposals from all three firms that were interviewed met or exceeded the goal. The Civic Edge Consulting team includes 17% DBE participation from two subconsultants: RDJ Enterprises, a San Francisco-based African American-owned firm, and TransSight, an Asian Subcontinent-owned firm.

**FINANCIAL IMPACT**

We have budgeted \$150,000 for the requested services, funded by a Memorandum of Agreement with the Planning Department and a federal Surface Transportation Planning grant. The proposed Fiscal Year 2018/19 budget amendment will include this year's activities, and future budgets will include sufficient funds for the remaining activities.

**CAC POSITION**

The CAC will consider this item at its June 27, 2018 meeting.

**SUPPLEMENTAL MATERIALS**

Attachment 1 – Scope of Services

## **Attachment 1 Scope of Services**

ConnectSF seeks assistance with developing a strong, integrated public outreach plan for its Transportation Network Development, the Transit Corridors Study and the Streets and Freeways Study (also known as ConnectSF Phase 2). The Transit Corridors Study and the Streets and Freeway Study are two stand-alone studies that will be prepared in parallel to identify the long-term projects and policies needed on the City's transit system, streets, and freeways to achieve the ConnectSF vision. Given the studies' broad reach and long-range horizon, an effective communications and engagement plan is needed to inform stakeholders and the general public about these efforts and solicit feedback on their development and content.

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

- Raise awareness about ConnectSF to the general public.
- Provide consistent and easy-to-understand public communication regarding ConnectSF and Phase 2 efforts.
- Create messaging, collateral, and branding that is informative, relevant, and engaging to the general public.
- Maintain a common voice and look and feel for ConnectSF materials.
- Strengthen quality assurance/quality control, while maintaining the flexibility for rapid responses.
- Engage with, and solicit input from, policymakers, the public, and stakeholder groups about Phase 2 activities, and in particular develop methods to obtain meaningful input from hard-to-reach-population segments.

The following Scope of Services is to be used as a general guide and is not intended to be a complete list of all work necessary to build an integrated communications and engagement plan for Phase 2 of the ConnectSF program.

Specific tasks include: 1) Project Kick-Off Meeting, Information Review, and Work Plan, 2) Planning for Public Outreach and Engagement, 3) Outreach Support Services, 4) Data Visualization, and 5) Administration and Reporting. The tasks are detailed below:

### **Task 1. Project Kick-Off Meeting, Information Review, and Work Plan**

Work Plan will include analysis of different groups for outreach and preferred methods to reach each one. Key audiences to targeted include, but are not limited to:

- a. Community-based Organizations, including transportation-focused groups and others
- b. General public
- c. Underrepresented groups, including youth, minorities, and low-income residents
- d. Groups representing the elderly or people with disabilities
- e. Employers
- f. Tourism interests
- g. ConnectSF Futures Task Force
- h. Transportation Authority Citizens Advisory Committee
- i. San Francisco Municipal Transportation Agency Citizens' Advisory Council
- j. Boards and Commissions
- k. Other transportation agencies

*Deliverables:*

## **Attachment 1 Scope of Services**

1. *Work plan outlining outreach methods, including specific outreach techniques for the various communities and entities identified above*

### **Task 2. Planning for Public Outreach and Engagement**

- a. Develop and implement a robust outreach strategy and communications plan covering 18-month processes
- b. Support the development and/or review of project communications collateral, such as in-language fact sheets, flyers, handouts, posters, mailers, surveys, social media, content and attachments for the website, and frequently asked questions

#### *Deliverables:*

1. *Execute the outreach plan, develop supporting collateral*

### **Task 3. Outreach Support Services**

- a. Secure venues for public meetings
- b. Develop and vet open house and workshop outreach plan
- c. Translation of materials
- d. Public notifications for open house, workshop events, or other public meetings
- e. Provide materials and logistical support for open house, workshop events, or other public meetings

#### *Deliverables:*

1. *Public meeting spaces identified and secured*
2. *Translation services secured*
3. *Meeting notifications*

### **Task 4. Data Visualization**

Provide support to staff to create compelling visualizations, “games,” and/or other materials to engage the public.

#### *Deliverables:*

1. *Data visualization platform selected*

### **Task 5. Administration and Reporting**

Weekly/monthly project phone calls/in-person progress meetings with ConnectSF staff, including agendas and meeting minutes. Management of overall project tasks and invoice preparation.

#### *Deliverables:*

1. *Meeting notes, progress updates*
2. *Project reporting and monthly invoices by task*