





Memorandum

Date: 02.05.14 **RE:** Finance Committee
February 11, 2014

To: Finance Committee: Commissioners Cohen (Chair), Wiener (Vice Chair), Chiu, Farrell, Tang and Avalos (Ex Officio)

From: Elizabeth Sall – Interim Deputy Director for Planning 

Through: Tilly Chang – Executive Director 

Subject: **ACTION** – Recommend Award of Three-Year Consultant Contracts, with an Option to Extend for Two Additional One-Year Periods, to Barbary Coast Consulting and Davis & Associates Communications, Inc. in a Combined Total Not to Exceed \$525,000 for On-Call Strategic Communications, Media, and Community Relations Professional Services and to Authorize the Executive Director to Negotiate Contract Payment Terms and Non-Material Contract Terms and Conditions

Summary

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. The establishment of contracts with one or more consultant teams will enable the Transportation Authority to enlist the services of a broad range of communications and outreach consultants on an on-call, task order basis. Therefore, on November 1, 2013, we issued a Request for Qualifications (RFQ) for strategic communications, media, and community relations professional services. By the due date of December 16, 2013, we received nine Statements of Qualifications in response to the RFQ. Interviews were held on January 9, 2014. Based on the competitive selection process defined in the evaluation criteria of the RFQ, the review panel recommends the award of consultant contracts to the two top-ranked teams. **We are seeking a recommendation to award three-year consultant contracts, with an option to extend for two additional one-year periods, to Barbary Coast Consulting and Davis & Associates Communications, Inc. in a combined total not to exceed \$525,000 for on-call strategic communications, media, and community relations professional services and to authorize the Executive Director to negotiate contract payment terms and non-material contract terms and conditions.**

BACKGROUND

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. Transportation Authority staff initiated a procurement process seeking on-call strategic communications, media, and community relations services to support the Transportation Authority's work program.

The purpose of this memorandum is to describe the procurement process and to seek a recommendation for the award of consultant contracts for on-call strategic communications, media, and outreach services.

DISCUSSION

The Transportation Authority historically has managed its communications directly through the management team and via consultant assistance. Based on feedback from the Board and our internal

staff analysis, we have identified the need to improve agency-wide and project-specific communication functions; and therefore, undertook a procurement process to seek communications and outreach teams with expertise in corporate communications, public and media relations, public outreach, and opinion/market research. The scope of work, described in detail in Attachment 1, includes tasks to support development of an agency-wide communications strategy, ongoing agency-wide external communications, as well as project-specific outreach and communications. We anticipate a total value needed for these types of services of \$525,000 over a three-year period.

Given the wide range of desired proficiencies and experience, there is a need for broad and deep access to communications and outreach skills in the on-call communications contract. We propose to contract with two consultant teams with which 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).

Procurement Process: On November 1, 2013, we issued a Request for Qualifications (RFQ 13/14-01) for on-call strategic communications, media and community relations professional services. We held a pre-response conference on November 8, 2013, which provided opportunities for small businesses and larger firms to meet and form partnerships. A total of 21 firms attended.

We took steps to encourage participation from small and disadvantaged business enterprises, including advertising in seven local newspapers: the San Francisco Chronicle, the San Francisco Examiner, the San Francisco Bay View, the World Journal, the Western Edition, the Small Business Exchange, and El Reportero. The Transportation Authority also distributed the RFQ, sign-in sheets for the pre-response conference, and periodic updates on the RFQ to certified small, disadvantaged and local businesses, Bay Area and cultural Chambers of Commerce, and the Small Business Councils.

By the due date of December 16, 2013, we received nine Statements of Qualifications (SOQs) in response to the RFQ. Interviews were held with the three top-ranked qualified teams on January 9, 2014. Interviews were conducted by a selection panel comprised of representatives from the San Francisco Municipal Transportation Agency and Transportation Authority staff. The selection panel evaluated the SOQs based on qualifications and other criteria identified in the RFQ. Based on the competitive process defined in the evaluation criteria of the RFQ document, the selection panel recommends that the Transportation Authority award contracts to the two highest-ranked firms: Barbary Coast Consulting (Barbary) and Davis & Associates Communications, Inc. (D&A).

The two highest-ranked teams provide a strong set of skills, specialists, and relevant project experience. In particular, Barbary builds upon a proven track record of performance in all on-call service task areas requested and a deep bench of highly qualified sub-consultants, and D&A demonstrates strong capabilities in communications vision and branding and other requested task areas.

For task orders valued at less than or equal to \$75,000, we may initiate task orders directly with any of the contracted teams based on considerations of skills/capabilities, availability, and conflicts of interest. For those task orders valued at greater than \$75,000, the Transportation Authority will seek proposals from all contracted teams and determine which firm to select. Each contract term will be for three years with the option to extend for two additional one-year periods.

The Transportation Authority will receive federal financial assistance to fund a portion of this procurement, and will adhere to federal regulations pertaining to Disadvantaged Business Enterprises (DBE). For this contract, we have established a DBE goal of 17%. SOQs from both teams met or exceeded the DBE goal. The Barbary team proposed 18% DBE participation from three women-owned firms: Hope Road Consulting, LLC (also a Hispanic-owned and San Francisco-based firm), Caribou

Public Relations, and Seasons Productions (also an Asian Subcontinent-owned and San Francisco-based firm). The D&A team proposed 17% DBE participation from its prime consultant, D&A, an African American- and women-owned firm, based in San Francisco.

We are seeking a recommendation to award three-year contracts, with an option to extend for two additional one-year periods, to Barbary and D&A in a combined total not to exceed \$525,000 for on-call strategic communications, media, and community relations professional services and to authorize the Executive Director to negotiate contract payment terms and non-material contract terms and conditions.

ALTERNATIVES

1. Recommend award of three-year contracts, with an option to extend for two additional one-year periods, to Barbary and D&A in a combined total not to exceed \$525,000 for on-call strategic communications, media, and community relations professional services and to authorize the Executive Director to negotiate contract payment terms and non-material contract terms and conditions.
2. Recommend award of three-year contracts, with an option to extend for two additional one-year periods, to Barbary and D&A in a combined total not to exceed \$525,000 for on-call strategic communications, media, and community relations professional services and to authorize the Executive Director to negotiate contract payment terms and non-material contract terms and conditions., with modifications.
3. Defer action, pending additional information or further staff analysis.

CAC POSITION

The CAC considered this item at its January 22 meeting, and unanimously adopted a motion of support for the staff recommendation.

FINANCIAL IMPACTS

The contract will be funded by a combination of federal, state, regional and Prop K funds. The Transportation Authority may receive federal financial assistance to fund a portion of this procurement from the U.S. Department of Transportation through the California Department of Transportation and/or the Metropolitan Transportation Commission. The first year's activity was included in the Transportation Authority's adopted Fiscal Year 2013/14 Budget. Sufficient funds will be included in future fiscal year budgets to cover the remaining cost of this contract.

RECOMMENDATION

Recommend award of three-year contracts, with an option to extend for two additional one-year periods, to Barbary and D&A in a combined total not to exceed \$525,000 for on-call strategic communications, media, and community relations professional services and for authorizing the Executive Director to negotiate contract payment terms and non-material contract terms and conditions.

Attachment

1. On-Call Strategic Communications, Media Relations, and Community Outreach Scope of Services

Attachment 1: On-Call Strategic Communications, Media, and Community Relations Scope of Services

SCOPE OF SERVICES

The Transportation Authority historically managed its communications directly through the management team and via consultant assistance. The Transportation Authority wishes to improve its agency-wide and project-specific communication functions and is seeking consultant expertise to help develop and implement a new communications strategy. In developing an agency-wide communication strategy, the Transportation Authority seeks to advance the following goals and objectives:

- Raise awareness about the Transportation Authority's role, purpose, and operations to the general public;
- Provide consistent and easy-to-understand public communication regarding agency work program efforts;
- Maintain a common voice among the agency's communications and strengthen quality assurance/quality control, while maintaining the flexibility for rapid responses;
- Engage policy-makers, the public, and stakeholder groups in the agency's initiatives and projects; in particular develop methods to obtain meaningful input from hard-to-reach-population segments;
- Outreach methods: develop a standardized set of outreach methods and tools that can be applied based on particular project/study needs.

To support achievement of these goals, the Transportation Authority desires technical expertise from consultants in the following core communications and outreach areas:

1. Corporate Communications
2. Public Relations
3. Media Relations
4. Public Outreach
5. Opinion/Market Research

The Transportation Authority anticipates that Task Orders will be developed to address the following three task areas during the duration of the contract:

Task 1 – Agency-Wide Communications Strategy: Lead Process to Implement New Communications Vision and Protocols

The Transportation Authority is interested in Consultant support to lead and advise on the process to move from the Transportation Authority's State of Practice to a new Communications Vision and Protocols. This will involve facilitating conversations with the agency's Board leadership, management team and key staff to establish roles, responsibilities, and processes. This process should also include recommendations from the Consultant about new or innovative technologies or communication techniques not currently used at the Transportation Authority that may better help it

meet its Communications Vision. This task includes helping and advising the Transportation Authority in the following:

A. Branding and Public Awareness

- Establish a regular newsletter or blog that highlights key Transportation Authority news and accomplishments;
- Develop a regular and more engaged presence on social media that includes commentary and involvement on important transportation news and research, and content from all aspects of the Transportation Authority's work program;
- Strengthen relationships with organizations and groups that represent civic, advocacy and neighborhood organizations, as well as community-based organizations that engage with hard-to-reach populations and communities of concern.

B. Policies and Protocols

- Design processes that ensure collateral is refreshed and updated on an appropriate and regular basis;
- Document design and outreach standards and processes to allow outside consultants to produce work for the Transportation Authority;
- Design processes for providing common voice and messaging in the myriad locations the Transportation Authority maintains a communications presence;
- Design processes for regular monitoring and evaluation of outreach methods and outcomes, including corrective/responsive changes to policies or procedures based on how well methods and outcomes are achieving goals.

Deliverables: Communications Management Strategy Proposal and Communications Strategy Implementation.

Task 2 – Agency-wide External Communications

- A. **Create technology-enhanced outreach tools.** Consultant will help develop, advertise and message external communications tools to broaden the visibility of the agency and support the Transportation Authority's oversight functions. This task includes development of adaptations to the www.sfbudgetczar.com website used to support outreach of the San Francisco Transportation Plan or development of other types of web-based tools to meet outreach needs of specific projects or studies.

Deliverables: Creation or enhancement of website/tools

- B. **Branding, Messaging, Rapid response.** Consultant will support the development of agency and sub-agency branding efforts and external messages to support clear communication about Transportation Authority objectives, activities, and programs including for the www.MyStreetSF.com website.

Deliverables: Branding tools, assets and guide; ongoing messaging support; agency spokesperson(s) support and training.

- C. **Media / PR services.** Consultant will support communications with media, including development of media communications materials and support for responding to media inquiries. The successful bidder will demonstrate experience with all media formats: print/online/radio, advertisements, and social media. Includes experience with neighborhood and ethnic media.
- Deliverables:** Press list and kit; media plan; media advisories and press release development and distribution; press events; letters to the editor and op-ed development and distribution; media coverage log.
- D. **Relationship Building and Management Support.** Consultant will track partner agency and policy-maker initiatives and suggest ways for the Transportation Authority to provide cross support or to collaborate on relevant initiatives.
- Deliverables:** Ongoing communications via social and traditional media.
- E. **Newsletter/Digital magazine and social media assistance,** including:
- Support regular Transportation Authority publication announcing key Transportation Authority news and activities;
 - Assist in administration of the agency's mass email system, MailChimp;
 - Assist in providing regular, comprehensive, and engaging social media updates on all relevant Transportation Authority work program items and responding to other social media users' relevant posts.
- F. **Opinion and Market Research.** Consultant will administer opinion research such as focus groups; surveys conducted via a range of methodologies (intercept, mail, online); polling or other types of opinion research as needed.
- Deliverables:** Focus group/polling summaries/results.
- G. **Monitoring, Evaluation, and Response.** Consultant will monitor effectiveness of ongoing external communication efforts relative to Communication Goals, and recommend corrective changes to policies or protocols based on findings.
- Deliverables:** Ongoing monitoring, evaluation, and response.

Task 3 – Project-specific Outreach and Communications

- A. **Targeted Communications Plans.** Work with project- or study-specific outreach consultant teams and Transportation Authority staff to develop a targeted communication plan for specific Transportation Authority initiatives, programs, studies, or projects. The successful bidder will demonstrate the ability to team with other community outreach firms and community-based outreach partners to develop and implement a project-specific communications plan that advances the Transportation Authority's goals.
1. Community groups. The successful bidder will demonstrate knowledge of neighborhood groups and venues. Bidders must be able to demonstrate good relationships with a wide range of community, government and media groups, including hard-to-reach groups.
 2. Outreach methods. Consultant will develop, arrange, and update a course of action for engaging various stakeholder groups throughout a specific initiative, study,

program, or project. Consultant will coordinate with a technical team to link the technical analysis and project refinement process to the outreach process. The successful bidder will have experience in the broad dissemination of information to the public through electronic and non-electronic means. This should include techniques to involve hard-to-reach communities that may require non-traditional approaches or community-based partnerships.

B. Outreach Plan Implementation. Consultant will lead or assist in executing project-specific outreach plans.

1. Preparing for and publicizing events. Consultant will coordinate logistics and prepare for outreach meetings, events, and activities. Consultant role may include developing an overall outreach schedule, planning and coordinating advertisements on transit, identifying community events to participate in, and developing social media campaigns for publicizing outreach opportunities, identifying meeting venues, arranging for meeting refreshments, and developing agendas and meeting formats.
2. Translation and interpretation. Consultant will provide translation of collateral materials into a range of languages, and non-English language interpretation at meetings and events, as necessary. Consultant should identify firms with translators who can convey nuance regarding transportation planning or funding effectively, rather than verbatim translations.
3. Webinars and other electronic forms of outreach. Consultant will arrange for and provide expertise to host webinars or other forms of web-based outreach, e.g. crowdsourcing tools.
4. Staffing events. Consultant will attend outreach meetings and activities for facilitation purposes or other support. The successful bidder will demonstrate experience in event facilitation.
5. Monitor and track outreach response including media hits.

C. Feedback Management. Consultant will monitor communications related to specific Transportation Authority initiatives, studies, programs, and projects, develop targeted responses as appropriate, and facilitate appropriate responses to feedback as appropriate, such as adjustment of policies or procedures.

1. Monitor input. Consultant will compile feedback from public workshops, presentations, emails, letters to the Transportation Authority Board, and other public correspondence. Consultant will identify key topics that require responses from the project team and manage responses.
2. Project-specific messaging. Consultant will assist with crafting messages in response to key feedback topics as needed. The successful bidder will demonstrate the ability to help stakeholders better understand the difficult trade-offs inherent to many local transportation decisions. Bidders must identify the target audience for any given message, and demonstrate the ability to translate technical information and engineering design concepts in simple language that is understandable by individuals with a variety of educational, socio-economic and linguistic backgrounds, and anticipate and address controversy appropriately.

Deliverables: Outreach documentation of notification and highlights - and summaries, internal and external FAQs, suggested modifications to policies and procedures.

- D. **Graphics, Copy and Visualization.** Consultant will work with the Transportation Authority's Senior Graphic Designer and project-or-study-specific technical consultant teams to develop graphical / visual materials to support outreach and communications collateral materials. Consultant will work with project teams to develop copy and ad language. Graphic / visual tools/skill areas needed include logos, maps, info-graphics, photosimulations, and graphic designs.

Deliverables: Logos, ads, maps, graphics, visualizations, photosimulations, as needed.