




February 21, 2018

To: Members of the Board of Directors

From: Jennifer L. Bergener, Managing Director 

Subject: Agreement for Pacific Surfliner Website Design and Development Services

Overview

On September 18, 2017, the Board of Directors approved the release of a request for proposals for consultant services to provide website design and development service for the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency. Proposals have been received and evaluated in accordance with the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency's procurement policies and procedures for professional and technical services. The Board of Directors is requested to authorize the Managing Director to negotiate and execute an agreement for these services.

Recommendations

- A. Approve the selection of Making Waves USA, Inc. to provide website design and development services for the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency.
- B. Authorize the Managing Director to negotiate and execute Agreement No. L-7-1917 between the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency and Making Waves USA, Inc., in the amount of \$650,000, for website design and development services for a two-year initial term with three, one-year option terms.

Discussion

An overview of the proposed Pacific Surfliner marketing program was provided in the fiscal year (FY) 2017-18 and 2018-19 Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) Business Plan (Plan), which was approved by the LOSSAN Agency Board of Directors (Board) on March 20, 2017. The Plan includes strategies for optimizing existing marketing efforts while building a framework to support future Pacific Surfliner marketing initiatives designed to grow awareness, ridership, and revenue. These marketing

activities include developing and maintaining the Pacific Surfliner website to utilize advanced functionality and a robust suite of technology tools to implement engaging, innovative, and cost-effective tactics that demonstrate return on marketing investments.

Procurement Approach

The Board-approved procurement was handled in accordance with the LOSSAN Agency's procedures for professional and technical services. In addition to cost, many other factors are considered in an award for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as staffing and project organization, prior experience with similar projects, work plan, and a fair and reasonable price structure.

On September 18, 2017, the Board authorized the release of Request for Proposals (RFP) 7-1917, which was issued and sent electronically to 2,778 firms through the Orange County Transportation Authority's (OCTA) Contract Administration and Materials Management website portal. A pre-proposal conference was held on September 26, 2017, with 12 attendees representing 11 different firms. Three addenda were issued to provide a copy of the pre-proposal registration sheet and presentation, extend the proposal due date, and respond to questions related to the RFP.

On October 23, 2017, proposals were received from 11 firms. An evaluation committee consisting of staff from OCTA's Contracts Administration Department, LOSSAN Agency staff, and a representative from Metrolink met to review all proposals received. The proposals were evaluated based on the following evaluation criteria and weights:

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|-------------------------------------|------------|
| • Qualifications of the Firm | 25 percent |
| • Staffing and Project Organization | 25 percent |
| • Work Plan | 30 percent |
| • Cost and Price | 20 percent |

Several factors were considered in developing these weights. Work plan is weighted at 30 percent to emphasize the importance of the firm demonstrating its ability to provide solutions specific to the LOSSAN Agency's digital marketing needs and opportunities. Qualifications of the firm is weighted at 25 percent because, due to the breadth and depth of the requested services, the successful firm must have a proven track record for meeting similar requirements in previous projects. Staffing and project organization is also weighted at 25 percent as the firm's proposed project team must demonstrate familiarity with required marketing specializations in terms of knowledge, skills, and experience. Cost and price is

weighted at 20 percent to ensure the LOSSAN Agency receives the best value for the requested services.

On November 1, 2017, the evaluation committee reviewed all proposals received based on the evaluation criteria and short-listed four firms. The four short-listed firms are listed below in alphabetical order:

Firm and Location

Making Waves USA, Inc. (Making Waves)
Chicago, Illinois

Rhythm Interactive (Rhythm)
Irvine, California

Rightpoint Consulting, LLC (Rightpoint)
Chicago, Illinois

Stellar
Redondo Beach, California

On November 9, 2017, the evaluation committee interviewed the four short-listed firms. The interviews consisted of a presentation to demonstrate the firms' understanding of LOSSAN Agency's strategic marketing and technology solutions for the Pacific Surfliner. The firms' project managers and key team members had an opportunity to present qualifications and respond to the evaluation committee's questions. Questions were asked relative to the firms' understanding of the scope of work, experience with the Episerver content management system (CMS), and collaborating with marketing teams to develop a website, as well as specific clarification questions related to each firm's proposal. After the interviews, a request for a best and final offer (BAFO) was sent to each firm to provide its final offer.

After considering the responses to the questions asked during the interviews and responses to the BAFO, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores, which did not result in a change to the overall ranking of the firms.

Based on the evaluation of the written proposals, information obtained from the interviews and the BAFO, the evaluation committee recommends Making Waves for consideration of award. The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

The short-listed firms were all qualified and demonstrated experience in providing strategic marketing and technology services.

Making Waves has been providing marketing and technology services since 2001, and the firm has locations in Chicago and New York with 32 employees in the United States and over 300 employees in Europe. Making Waves' past work with General Dynamics Information Technology, Ruter AS (a public transit authority in Norway), and Blue Buffalo highlighted the firm's experience in website design and architecture, content strategy, content management system development and implementation, and data management services, as well as strategic and technical consultation. As required in the scope of work, Making Waves is an Episerver Certified Partner. The firm has launched more than 150 websites using the Episerver CMS. In addition, Making Waves' references reported that they were satisfied with the firm's performance. During the interview, Making Waves demonstrated its experience and capabilities for providing strategic marketing and technology services.

The remaining three short-listed firms' proposals highlighted their experience in providing website design and development services to various clients, including Adidas, Allcare Health, and Indianapolis Power and Light. One of the three firms is an Episerver Certified Partner and references reported that they were satisfied with the firms' performances. During the interview, the firms demonstrated their experience and capabilities for providing strategic marketing and technology services.

Staffing and Project Organization

Each firm proposed experienced and knowledgeable project teams.

Making Waves proposed a qualified project team with relevant experience. The proposed individuals have previously worked as a team on past projects identified in the firm's proposal. In addition, the proposed staffing plan clearly demonstrated an effective project management approach to ensure sufficient availability of resources to meet the LOSSAN Agency's marketing and technology needs. During the interview, the project team demonstrated team cohesiveness and provided concise and thorough responses, which assured the evaluation committee of the project team's knowledge and expertise.

The remaining three short-listed firms proposed qualified project teams with relevant experience. The proposed individuals have previously worked as a team on past projects identified in the firm's proposal. In addition, the proposed staffing plan clearly demonstrated an effective project management approach to ensure sufficient availability of resources to meet the LOSSAN Agency's marketing and

technology needs. During the interview, the firms' project teams presented well and were responsive to the interview questions.

Work Plan

All four short-listed firms met the requirements of the RFP by describing their individualized approach to providing strategic marketing and technology services for the Pacific Surfliner service.

Making Waves presented a comprehensive work plan that addressed all the elements of the scope of work. The firm's proposal discussed its approach to meeting the project requirements by providing a detailed three-phase plan for delivering a website. In addition, the firm described the planning, design and implementation, as well as the content migration services needed to develop a new Pacific Surfliner website. During the interview, Making Waves' recommendations for creating an engaging and personally relevant customer experience by leveraging personalization tools demonstrated a thorough understanding of the LOSSAN Agency's needs and requirements.

The remaining three short-listed firms provided a detailed work plan that was responsive to the scope of work. The firms described the planning, design and implementation, as well as the content migration services needed to develop a new Pacific Surfliner website. The firms' recommendations and discussion during the interview regarding their approach for creating an engaging and personally relevant customer experience by leveraging personalization tools for the Pacific Surfliner website demonstrated a good understanding of the RFP requirements.

Cost and Price

Pricing scores were based on a formula which assigns the highest score to the firm with the lowest weighted average hourly rate, and scores the other proposals' weighted average hourly rates based on their relation to the lowest weighted average hourly rate. Making Waves' proposed hourly rates are deemed fair and reasonable as they are competitive and consistent with prior OCTA and LOSSAN Agency agreements for similar services.

Procurement Summary

Based on the evaluation of the written proposals, the firms' qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of Making Waves as the top-ranked firm to provide strategic marketing and technology solutions for the LOSSAN Agency. Making Waves delivered a comprehensive proposal and an interview that was responsive to the requirements of the RFP.

Fiscal Impact

Funding for this project was approved in the LOSSAN Agency's Fiscal Year 2017-18 and Fiscal Year 2018-19 Plan, and is funded with marketing funds provided by the State of California.

Summary

Based on the information provided, staff recommends the Board of Directors authorize the Managing Director to negotiate and execute Agreement No. L-7-1917 with Making Waves USA, Inc. in the amount of \$650,000, to provide website design and development services for a two-year initial term with three, one-year option terms.

Attachments

- A. Review of Proposals, RFP 7-1917 Pacific Surfliner Website Design and Development Services
- B. Proposal Evaluation Criteria Matrix, RFP 7-1917: LOSSAN Website Design and Development Services
- C. Contract History for the Past Two Years, RFP 7-1917 LOSSAN Website Design and Development Services

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