




**September 16, 2019**

**To:** Members of the Board of Directors

**From:** Jennifer L. Bergener, Managing Director 

**Subject:** Approval to Release Request for Proposals for Pacific Surfliner Creative Services

### **Overview**

Consultant support is needed to provide marketing services for the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency, including creative services and strategic consultation. Staff has developed a request for proposals to initiate a competitive procurement to select a consultant to provide the requested services.

### **Recommendations**

- A. Approve the proposed evaluation criteria and weightings for Request for Proposals 9-1542 for the selection of a consultant to provide creative services for the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency.
- B. Approve the release of Request for Proposals 9-1542 for creative services for the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency for a one-year initial term with two, two-year option terms.

### **Discussion**

The Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency (Agency) is responsible for marketing the Pacific Surfliner service in order to enhance public awareness of the service and increase ridership and revenue.

In mid-2018, the LOSSAN Agency initiated a competitive procurement process for consultant support to assist staff in strategic, creative, and technical aspects of marketing the Pacific Surfliner service. On November 28, 2018, the LOSSAN Agency Board of Directors (Board) awarded a contract for marketing services, with a one-year initial term and two, two-year option terms. The one-year initial term of the agreement expires December 31, 2019. It was determined that it is not in the best interest of the LOSSAN Agency to execute the option years in the

current contract. Re-procuring for marketing services will allow staff to better structure the contract moving forward and update the scope of work (SOW) to reflect the strategic marketing goals and anticipated efforts in the coming year. Therefore, the LOSSAN Agency is initiating the procurement process for a new contract that includes an updated SOW.

Marketing services are required for creative support and strategic consultation as needed to meet marketing program goals and position the Pacific Surfliner as a preferred transportation option.

Marketing services include the following:

- Creative implementation of data-driven, multi-channel media campaigns that target specific audience segments and optimize direct response rates
- Supporting ongoing efforts including print and digital advertising, email marketing, collateral development, onboard, and social media
- Creating marketing materials that resonate with target audiences and meet both brand standards and business objectives to increase awareness, revenue, and ridership
- Expanding destination-based marketing efforts through content that captures the engaging experiences, unique rider perspectives, and memorable events surrounding the Pacific Surfliner service
- Ensuring effective design, layout, editorial, and art direction from concept development, execution, and production tailored to strategic messaging goals
- Provide production, printing, and fulfillment of marketing collateral

### ***Procurement Approach***

The LOSSAN Agency's Board-approved contracting and procurement policy requires that the Board approve all requests for proposals (RFP) over \$100,000, as well as approve the evaluation criteria and weightings. LOSSAN Agency staff is submitting for Board approval the draft RFP and evaluation criteria and weights, which will be used to evaluate the proposals received in response to the RFP. The proposed evaluation criteria and weights are as follows:

- |                                     |            |
|-------------------------------------|------------|
| • 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 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.

The contract resulting from this procurement will be a one-year initial term with two, two-year option terms. The budget for the initial one-year term of this project is \$400,000.

#### **Fiscal Impact**

Marketing services were included in the LOSSAN Agency's Fiscal Year (FY) 2019-20 and 2020-21 annual business plan and Board-adopted budget. The LOSSAN Agency requested and received \$2 million in state-provided marketing funds for FY 2019-20. This amount is consistent with the three prior FY marketing budgets approved by the California State Transportation Agency.

#### ***Summary***

Board of Directors approval is requested to release Request for Proposals 9-1542 to provide creative services for the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency, including creative services and strategic consultation.

***Attachment***

- A. Draft Request for Proposals (RFP) 9-1542 Pacific Surfliner Creative Services

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