



May 18, 2020

To: Members of the Board of Directors
Donna DeMartino
From: Donna DeMartino, Managing Director
Subject: Agreement for Pacific Surfliner Digital Marketing Services

Overview

On February 18, 2020, the Board of Directors approved the release of a request for proposals for consultant services to provide digital marketing services for the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency's Pacific Surfliner marketing program. Proposals have been received and evaluated in accordance with the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency's procurement procedures for professional and technical services. Board of Directors' approval is requested to execute an agreement for these services.

Recommendations

- A. Approve the selection of GoSeeTell Network, doing business as Sparkloft Media to provide digital marketing services for the Pacific Surfliner marketing program.
- B. Authorize the Managing Director to negotiate and execute Agreement No. L-0-0001 between the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency and GoSeeTell Network, doing business as Sparkloft Media, in the amount of \$198,000, to provide digital marketing services for the Pacific Surfliner marketing program for a one-year term.

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. The official Pacific Surfliner social media channels, which include Facebook, Twitter, Instagram, YouTube, and a blog have become an increasingly important asset to the marketing program through educating the public about the service, inspiring trips, and driving traffic to PacificSurfliner.com.

In late 2018, the LOSSAN Agency initiated a competitive procurement process for consultant support to assist staff in social media marketing of the Pacific Surfliner service. The competitive procurement was issued for \$50,000, and awarded for a one-year term. The contract helped to grow and enhance the Pacific Surfliner social media program, allowing digital platforms to further support marketing program goals and position the Pacific Surfliner as a preferred transportation option. It was determined that the marketing program would benefit from a larger engagement with a more robust scope of work (SOW) that will continue to build on the success of these digital platforms and expand growth opportunities. Therefore, the LOSSAN Agency initiated the procurement process for a new contract for digital marketing support that includes a more comprehensive SOW.

Digital marketing services SOW includes the following:

- Managing the official Pacific Surfliner social media accounts.
- Developing content, such as blog articles, social posts, photography, and videos.
- Interacting with individuals who post about the Pacific Surfliner online.
- Strategically planning out social media campaigns to drive website traffic to PacificSurfliner.com.
- Planning, producing, placing, and optimizing paid media.
- Engaging with influencers (individuals on social media with large followings) to increase exposure of the Pacific Surfliner.
- Building reports to inform on the performance of the program and identify opportunities for growth.

Procurement Approach

The procurement was handled in accordance with the LOSSAN Agency's Board of Directors (Board)-approved procurement procedures for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as prior experience with similar projects, staffing and project organization, work plan, as well as cost and price.

On February 18, 2020, the LOSSAN Agency's Board authorized the release of Request for Proposals (RFP) 0-2025 for a one-year initial term with two, one-year option terms. The solicitation was inadvertently issued with only a one-year term and no option terms; therefore, the award of this agreement will be issued for only a one-year term. Staff will return to the LOSSAN Agency's Board for approval to release a new solicitation and award a new contract next year.

RFP 0-2025 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on February 18 and 25, 2020. A

pre-proposal conference took place on February 25, 2020 with six attendees representing four firms. Two addenda were issued to make available the pre-proposal conference registration sheets and presentation, as well as respond to questions related to the RFP.

On March 10, 2020, 13 proposals were received. An evaluation committee consisting of Orange County Transportation Authority (OCTA) staff from Contracts Administration and Materials Management, as well as LOSSAN Agency staff, met to review all proposals received. The proposals were evaluated based on the following Board-approved 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 was 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 was weighted at 25 percent because the successful firm needed to demonstrate a proven track record for meeting similar requirements in previous projects due to the breadth and depth of the requested services. Staffing and project organization was also weighted at 25 percent as the firm's proposed project team needed to demonstrate familiarity with required marketing specializations in terms of knowledge, skills, and experience. Cost and price were weighted at 20 percent to ensure the LOSSAN Agency receives the best value for the requested services.

On March 24, 2020, the evaluation committee reviewed the proposals based on the evaluation criteria. Based on the overall scores the evaluation committee short-listed the two most qualified firms listed below in alphabetical order:

Clockwork Media, LLC (Clockwork)
Los Alamitos, California

GoSeeTell Network, doing business as Sparkloft Media (Sparkloft)
Portland, Oregon

On April 1, 2020, the evaluation committee conducted interviews with the two short-listed firms. The interviews consisted of a presentation to demonstrate the firms' understanding of LOSSAN's requirements. The firms' project managers and key team members had an opportunity to present each team's qualifications and respond to the evaluation committee's questions. Questions were asked relative to the firm's prior experience, key personnel and their areas of expertise, how the firm works with technical collaborators (copywriters, designers, animators, etc.) to produce content and ensure the projects requirements are met, and the firms

understanding of the Pacific Surfliner service in the travel market. In addition, each team was asked a specific clarification question related to their proposal.

After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and made adjustments to individual scores.

Based on the evaluation of the written proposals, the firms' qualifications, proposed costs, and the information obtained from the interviews, the evaluation committee is recommending Sparkloft for consideration of award. The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

Sparkloft has experience providing marketing services for various agencies including Visit Santa Barbara for the City of Santa Barbara, Travel Oregon for the State of Oregon, and the Pacific Surfliner for the LOSSAN Agency. Located in the City of Portland, Oregon, the firm was established in 2006 and has 55 employees. Sparkloft has promoted tourism throughout Southern California including Santa Barbara, Palm Springs, Beverly Hills, and various projects for Warner Brothers Studio Hollywood. The firm recently finished providing content marketing services for the LOSSAN Pacific Surfliner service.

Located in the City of Los Alamitos, California, Clockwork was established in 2010 and has 12 employees. The firm demonstrated experience related to promotions and digital marketing through its work with the City of Arcadia, Long Beach Unified School District, and Toyota USA. Clockwork has a production studio and demonstrated experience with social media influencers with multiple languages. Clockwork demonstrated no experience providing digital marketing in the area of transportation.

Staffing and Project Organization

Sparkloft's proposed a team with various skills and experience that will assist the production of digital marketing services. The account manager has over 10 years of experience and is the director of social media services with experience as a social media strategist. The proposed account lead has experience focusing on client revenue growth, advertising strategy and content development. The proposed strategy lead has experience providing campaign management, paid media strategy, reporting, trends and analysis. Other staff have experience creating and promoting campaign content, sourcing, copywriting, and publishing promotions similar to Pacific Surfliner campaigns. Similar campaigns include "Love Letters to Oregon" created to mobilize the community to other areas of Oregon and "Get out of Town Tours" encouraging residents and visitors to travel for recreation also for the State of Oregon. The goal of these existing campaigns are similar to the ridership awareness goals of the Pacific Surfliner. During the

interview, the project team demonstrated strong organizational skills with no conflict among the other key personnel.

The proposed project manager for Clockwork has over 15 years of experience in editorial and advertising campaigns. The project manager also has digital print experience including advertising, marketing, program management, social media and graphic design. Other key personnel also have experience with digital media services and partner with social media influencers. Clockwork's proposed staff have limited experience creating and advertising for the transportation industry.

Work Plan

Sparkloft demonstrated a thorough understanding of the project requirements by addressing all the elements of the scope of work. The firm detailed its approach for each task and included how the firm will approach new social marketing trends. Sparkloft identified many types of campaigns and provided a sample brand campaign with a sample calendar for the social media strategy. The firm demonstrated their approach to crisis communication and provided detailed information on how Sparkloft will be able to aid in a crisis campaign. Sparkloft identified tools to use during the project including team communication software, project management software, and customer experience management software. In addition, Sparkloft proposed enhancements to multiple tasks like paid influencers, enterprise social media, and an all-in-one social media tool.

Clockwork demonstrated a good understanding of the project requirements by addressing all the elements of the scope of work. The firm detailed its approach through stages instead of tasks and did not include the deliverables for each task as identified in the scope of work. The work plan included a standard process of an advertisement campaign and sample media consisting of videos and graphic postings made for the Pacific Surfliner. The firm also identified technical innovation tools including workflow communication software, cloud-based document storage, and project management and accounting software.

Cost and Price

Pricing scores were based on a formula that assigned the highest score to the firm with the lowest total firm-fixed price for the tasks to be completed, and scored the other proposal's total firm-fixed prices based on their relation to the lowest total firm-fixed price. Sparkloft's proposed total firm-fixed price is deemed fair and reasonable as it is lower than the independent cost estimate.

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 Sparkloft Media as the top-ranked firm to provide consultant services for the Pacific Surfliner digital marketing program.

Fiscal Impact

The LOSSAN Agency's Board-adopted fiscal year (FY) 2019-20 budget and FY 2019-20 and 2020-21 annual business plan approved by the California State Transportation Agency (CalSTA) includes \$2,000,000 in state-provided marketing funds and the use of \$1,450,000 in remaining marketing funds from prior FYs. The value of the agreement is a maximum obligation, not to exceed amount. The actual marketing expenditures programmed for this agreement for FY 2020-21 will be adjusted to be in alignment with future budget allocations approved by the LOSSAN Board and funded by CalSTA.

Summary

Based on the information provided, the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency staff recommends the Board of Directors authorize the Managing Director to negotiate and execute Agreement No. L-0-0001 with GoSeeTell Network, doing business as Sparkloft Media, in the amount of \$198,000, to provide digital marketing services for the Pacific Surfliner marketing program for a one-year term.

Attachments

- A. Review of Proposals, RFP 0-2025 Pacific Surfliner Digital Marketing Services
- B. Proposal Evaluation Criteria Matrix, RFP 0-2025 Pacific Surfliner Digital Marketing Services (Short-Listed Firms)
- C. Contract History for the Past Two Years, RFP 0-2025 Pacific Surfliner Digital Marketing Services

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