




July 15, 2024

To: Members of the Board of Directors
From: Jason Jewell, Managing Director 
Subject: Agreement for Pacific Surfliner Field Marketing Services

Overview

On March 18, 2024, the Board of Directors approved the release of a request for proposals for field marketing services 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 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 The Abbi Agency to provide field marketing services for the Pacific Surfliner marketing program.
- B. Authorize the Managing Director to negotiate and execute Agreement No. L40001 between the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency and The Abbi Agency, in the amount of \$550,000, for a one-year initial term with two, two-year option terms.

Discussion

Field marketing is an important part of the Los Angeles – San Diego – San Luis Obispo (LOSSAN) Rail Corridor Agency's marketing and communications toolbox. Field marketing efforts ensure that the LOSSAN Agency develops and maintains robust relationships with partners and communities across the corridor.

The Field marketing vendor is responsible for assisting internal LOSSAN Agency staff with promoting the Pacific Surfliner as a viable transportation option for travelers to destinations along the LOSSAN rail corridor and beyond. Under the scope of the agreement, the consultant will facilitate cooperative advertising, social

media, and promotional opportunities with partners in the travel industry, as well as with relevant sports teams, festivals, special events, and trade shows along the LOSSAN rail corridor. The consultant will also plan, promote, and implement outreach events that drive brand awareness and strengthen relationships with communities served.

Procurement Approach

The procurement was handled in accordance with the LOSSAN Agency's Board of Directors (Board)-approved procedures for professional 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 March 18, 2024, the Board approved the release of Request for Proposals (RFP) 4-2080, which was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on March 18 and 25, 2024. A pre-proposal conference was held on March 26, 2024, with eleven (11) attendees representing nine (9) firms.

On April 11, 2024, 17 proposals were received. An evaluation committee consisting of the Contracts Administration and Materials Management department and LOSSAN Agency, as well as external evaluators from San Joaquin Joint Powers Authority and Capitol Corridor Joint Powers Authority met to review all proposals received.

The proposals were evaluated based on the following LOSSAN 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 weightings. Qualifications of the firm were weighted at 25 percent due to the breadth and depth of the requested services as the successful firm had to demonstrate a proven track record for delivering similar requirements in previous projects. Staffing and project organization was also weighted at 25 percent as the firm's proposed project team had to demonstrate familiarity with required marketing specializations in terms of knowledge, skills, and experience. Work plan is weighted the highest 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. Cost and price were weighted at 20 percent to ensure the LOSSAN Agency receives the best value for the services provided.

On April 23, 2023, the evaluation committee reviewed all proposals received based on the evaluation criteria and short-listed the two most qualified firms. The two short-listed firms are listed below in alphabetical order:

Firm and Location

Rocket Launch Marketing and Public Relations (Rocket Launch)

Headquarters: Chino Hills, California

Project Office: Orange, California

The Abbi Agency

Headquarters: Reno, Nevada

Project Office: Reno, Nevada

On May 7, 2024, the evaluation committee conducted interviews with the two short-listed firms. Each interview consisted of a presentation to demonstrate the firm's understanding of the LOSSAN Agency's requirements. The firm's key team members had an opportunity to present each team's qualifications, as well as provide sample field marketing approaches and respond to the evaluation committee's questions. Questions were asked relative to the firm's approach in providing field marketing services, including content development, strategic planning, and account management of the Pacific Surfliner social media platforms.

After considering the responses to the questions asked during the interviews, as well as information provided in the best and final offer (BAFO), the evaluation committee reviewed the preliminary ranking and adjusted individual scores. However, The Abbi Agency remained the higher-ranked firm with the highest overall score.

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

Qualifications of the Firm

The Abbi Agency is headquartered in Reno, Nevada with offices in Las Vegas, Nevada and Helena, Montana. The Abbi Agency has been in business specializing in marketing since 2008. The firm has a total staff of 41 employees and is currently providing social media services to the LOSSAN Agency for the Pacific Surfliner. The Abbi Agency has also provided similar services to various public agencies in the travel, tourism, and transportation industries. These clients include Go Goleta, Visit Carmel-by-the-Sea, Explore Murrietta, Nevada Department of Transportation, and Mendocino Railway. During the interview, the

firm provided relevant samples of field marketing support for other government agencies, demonstrating the firm's ability to conduct outreach on behalf of the Pacific Surfliner. The firm received positive feedback from its references.

Rocket Launch, located in Orange, California, and has been providing full-service marketing and public relations services since 2017. It has a total staff of 14 employees. The firm has prior experience providing similar services to clients, such as the Orange County Fair & Event Center, Los Angeles County Fair, Anaheim Transportation Network, the Hilbert Museum of California Art, and the County of Orange. The firm provided work samples for some of the deliverables in the scope of work (SOW) related to field marketing; however, the samples did not demonstrate experience with multilingual outreach as required in the SOW. During the interview, Rocket Launch provided responses to the evaluation committee's questions related to its prior experience with sponsorships/partnerships relevant to field marketing services. The firm received positive feedback from its references.

Staffing and Project Organization

The Abbi Agency proposed an experienced project team with relevant educational backgrounds and previous project experience in field marketing and advertising in the travel and tourism industry. Additionally, the team demonstrated familiarity with the Pacific Surfliner. The proposed project manager has extensive experience in destination marketing as she is the current project manager for the Pacific Surfliner's social media marketing efforts. During the interview, The Abbi Agency's project team demonstrated a strong understanding of the Pacific Surfliner audience. Furthermore, in the interview, the project team demonstrated a thorough understanding of the LOSSAN Agency's needs, such as increasing ridership, growing awareness, and engaging with the public through their responses to the evaluation committee's questions.

Rocket Launch's proposed project team demonstrated a diverse set of skills and relevant experience in the marketing and public relations industry. The proposed project manager, also co-founder of Rocket Launch, has seven years' experience and was recognized in 2022 as part of the Greater Irvine Chamber's "40 Under 40" honoring community and business leaders in Orange County. Although Rocket Launch provided clarity during the interview on the extent of its collaboration with the proposed subcontractor, Arellano Associates, the firm did not demonstrate familiarity or understanding of the Pacific Surfliner and its field marketing needs. It appeared the firm had conducted limited research on the Pacific Surfliner and the LOSSAN Agency's market position.

Work Plan

The Abbi Agency's work plan demonstrated a thorough understanding of the SOW as required for the success of the project. Each requirement outlined in the

SOW was addressed with details as to how they would be completed, and the firm provided a clear rationale for the approach to completing the requirements. The work plan included examples of marketing activities that will be carried out as part of the project, such as a list of potential events, ambassador partnerships, and relationship building with stakeholders. The Abbi Agency proposed providing ongoing reporting and insights on a monthly basis to recap the strategy, objectives, budget, and current return on advertising spend, as well as a granular look at the performance across all initiatives. During the interview, the project team provided detailed responses to the evaluation committee's questions related to the LOSSAN Agency's requirements, such as increasing ridership, growing awareness, and engaging with the public.

Rocket Launch presented a well-organized approach with necessary steps for completing the SOW. The firm's work plan reflects that it understood the importance of multilingual outreach and engagement; however, the firm did not provide any relevant or previous work samples. While the firm included some experience on field marketing (events and outreach), it was more focused on creative development overall (design and campaign). During the interview, the firm elaborated on its multilingual outreach experience as it relates to field marketing presented in its proposal and discussed its sponsorships/partnerships experience with field events, sports sponsorships, broadcasting advertising, radio ads, and universities.

Cost and Price

Pricing scores were based on a formula which assigned the highest score to the firm with the lowest weighted average hourly rate, and scored the other proposals' weighted average hourly rates based on their relation to the lowest weighted average hourly rate. The Abbi Agency's proposed hourly rates are deemed fair and reasonable as they are competitive among the proposing firms and consistent with the LOSSAN Agency project manager's independent cost estimate.

Procurement Summary

Based on the evaluation of the written proposals, the firm's qualifications, the information obtained from the interviews and BAFOs, as well as cost and price, the evaluation committee recommends the selection of The Abbi Agency as the top-ranked firm to provide field marketing services for the Pacific Surfliner. The Abbi Agency delivered a thorough and comprehensive proposal and interview that was responsive to all the requirements of the RFP.

Fiscal Impact

The \$550,000 budget for the initial term of this agreement is a not-to-exceed maximum obligation. Funding for this initial term is included in the Fiscal Year (FY) 2024-25 and FY 2025-26 budgets. The actual marketing spend for FY 2024-25 will be adjusted to be in alignment with the funding amounts approved by the California State Transportation Agency. Future option terms for this agreement will be brought back to the Board for approval in accordance with the LOSSAN Agency procurement policy and included in future FY budget proposals.

Summary

Staff is recommending the Board of Directors authorize the Managing Director to negotiate and execute Agreement No. L-4-0001 with The Abbi Agency, in the amount of \$550,000, to provide field marketing services for the Pacific Surfliner marketing program for a one-year initial term with two, two-year option terms.

Attachments

- A. Review of Proposals, RFP 4-2080 Pacific Surfliner Field Marketing Services
- B. Proposal Evaluation Criteria Matrix (Short-listed Firms), RFP 4-2080 Pacific Surfliner Field Marketing Services
- C. Contract History for the Past Two Years, RFP 4-2080 Pacific Surfliner Field Marketing Services