

**METROPOLITAN  
TRANSPORTATION  
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TO: Operations Committee

DATE: July 3, 2014

FR: Executive Director

W.I. 1221

RE: Consultant Panel - On-Call Consultant Assistance for Operational Programs  
Customer Information Services

- |                                |                                  |
|--------------------------------|----------------------------------|
| i. Caribou Public Relations    | vi. Moore & Associates, Inc.     |
| ii. Civic Resource Group       | vii. Redhill Group, Inc.         |
| iii. Corey, Canapary & Galanis | viii. Sidecar                    |
| iv. Holografik Inc.            | ix. Synapse Strategies           |
| v. MIG, Inc.                   | x. OneWorld Communications, Inc. |

This memorandum requests approval of the above-listed panel of consultants to provide On-Call Consultant Assistance for Operational Programs Customer Information Services to support operational programs for a three-year period ending June 30, 2017.

**Background**

Customer-facing operational programs – such as Clipper<sup>®</sup>, FasTrak<sup>®</sup>, 511, Freeway Service Patrol, and the Bay Area Express Lane Network – must maintain visibility with both existing and potential customers and routinely communicate offerings and program policies. In the past, each program has secured consultant services to support these efforts through individual procurements. With multiple procurements expiring in the near future and the opening of Express Lanes starting in 2016, this consultant bench is needed to support operational programs' customer communications needs.

**Procurement Process**

On April 22, 2014, MTC issued a Request for Qualifications (RFQ) for On-Call Consultant Assistance for Operational Programs Customer Information Services for a three-year period beginning July 1, 2014 and ending June 30, 2017, with an option to extend contracts for incomplete work. In response to the RFQ issued on May 27, 2014, MTC received Statements of Qualifications (SOQs) from a total of 14 consulting firms:

- |                             |                                     |
|-----------------------------|-------------------------------------|
| • Alvarez & Marsal          | • Moore & Associates, Inc.          |
| • Caribou Public Relations  | • OneWorld Communications, Inc.     |
| • Civic Resource Group      | • Redhill Group, Inc.               |
| • Corey, Canapary & Galanis | • Resource Development Agency, Inc. |
| • Holografik Inc.           | • School of Thought, Inc.           |
| • Left Lane Advisors        | • Sidecar                           |
| • MIG, Inc.                 | • Synapse Strategies                |

Firms submitting SOQs were given the option to submit qualifications for one or more of the following categories, depending on their expertise:

1. Research
2. Strategic Planning
3. Creative Development
4. Online Services
5. Outreach and Community-Based Services

All 14 firms were found to meet the minimum qualifications in their respective categories for a total of 39 proposals amongst the categories.

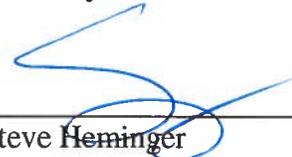
A review panel consisting of MTC staff evaluated the SOQs based on the following criteria: the firm's experience and qualifications; the proposed key staff's experience and qualifications; depth of resources; project management approach, quality control/assurance, project understanding, and performance monitoring; specialized expertise to cover specific work categories; written communication; and hourly rates. Based on the results of the evaluation, staff recommends that the firms shown in Attachment 1 be approved as pre-qualified consultants for the listed categories. A composite evaluation score of "Good" or "Exceptional" was used as the threshold for selection to the bench. All of the selected firms demonstrated strong project management skills, required experience and expertise, and a depth of available resources within their project team in relation to the categories for which they were selected. Of the ten recommended firms, seven are local to the region. Additionally, three are women-owned, two are small firms, and, while not required by the contract, one firm is certified as a Disadvantaged Business Enterprise (DBE).

Four firms, while they met the Minimum Qualifications, are not being recommended for the consultant panel as their proposals were not deemed by the review panel to be as competitive as others based on the services sought under this procurement. These four firms are:

- Alvarez & Marsal
- Left Lane Advisors
- Resource Development Agency, Inc.
- School of Thought, Inc.

### **Recommendation**

Staff recommends that the Operations Committee approve the consultant panel identified in Attachment 1 in the specified categories to provide on-call consultant assistance for customer information services to MTC, BATA, BAIFA, or MTC SAFE, as appropriate, on an as-needed basis, for a period extending through June 30, 2017, with an option for the applicable agency to extend contracts for incomplete work. The amount included for the Clipper<sup>®</sup> and FasTrak<sup>®</sup> programs in the FY 2014-15 budget is \$1.9 million. Additional funds may become available for future fiscal years subject to the annual budget approval process. Staff will return to the Operations Committee for authorization of any contracts exceeding the Executive Director's signature authority.



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Steve Heminger

REQUEST FOR COMMITTEE APPROVAL  
Summary of Proposed Consultant Panel

Work Item No.: 1221, 1252, 6843

Contractors: See Attachment 1 to Executive Director's Memorandum, dated July 3, 2014

Work Project Title: On-Call Consultant Assistance for Operational Programs  
Customer Information Services

Purpose of Project: Provide consultant assistance for Clipper<sup>®</sup>, FasTrak<sup>®</sup>, Bay Area Express Lane Network and other similar operational programs.

Brief Scope of Work: To support customer education and outreach efforts for the Clipper<sup>®</sup> fare payment system, the FasTrak<sup>®</sup> toll payment system, the Bay Area Express Lane Network, 511, Freeway Service Patrol, and other transportation related operational programs.

Project Cost Not to Exceed: Individual contracts TBD.

Funding Source: Varies

Fiscal Impact: No immediate fiscal impact until contracts are awarded. \$1,850,000 is included in the FY 2014-15 agency budget for Clipper<sup>®</sup> and FasTrak<sup>®</sup> contracts. Funds for future fiscal years are subject to agency budgetary approval process.

Motion by Committee: That the above-referenced consultants be pre-qualified to enter into contracts with MTC, BATA, BAIFA, and MTC SAFE to provide on-call consultant assistance for operational programs customer information services on an as-needed basis through June 30, 2017, as described above and in the Executive Director's memorandum dated July 3, 2014, subject to applicable contract approval procedures and necessary budget approvals, with an option on the part of the applicable agency to extend contracts with incomplete work.

Operations Committee:

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Jake Mackenzie, Chair

Approved: Date: July 11, 2014

**Attachment 1**  
**Consultant Panel - On-Call Consultant Assistance for Operational Programs Customer Information Services**

**List of Firms and Categories**

<i><b>Firm Name</b></i>	<i><b>Categories</b></i>				
	<b>A.</b> Research	<b>B.</b> Strategic Planning	<b>C.</b> Creative Development	<b>D.</b> Online Services	<b>E.</b> Outreach & Community-Based Services
OneWorld Communications, Inc. <i>San Francisco, CA</i>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
Synapse Strategies <i>Oakland, CA</i>		<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
Sidecar <i>Berkeley, CA</i>		<b>X</b>	<b>X</b>	<b>X</b>	
MIG, Inc. <i>Berkeley, CA</i>		<b>X</b>	<b>X</b>	<b>X</b>	
Corey, Canapary & Galanis <i>San Francisco, CA</i>	<b>X</b>				
Redhill Group, Inc. <i>Irvine, CA</i>	<b>X</b>				
Moore & Associates, Inc. <i>Valencia, CA</i>			<b>X</b>		
Civic Resource Group <i>Los Angeles, CA</i>				<b>X</b>	
Holografik Inc. <i>San Francisco, CA</i>				<b>X</b>	
Caribou Public Relations <i>Martinez, CA</i>					<b>X</b>
<i>Total Number of Firms/Category</i>	3	4	5	6	3