

REQUEST FOR PROPOSALS

INTERCITY ELECTRIC BUS SERVICE OUTREACH CAMPAIGN, PLAN, AND ON-CALL LAUNCH MARKETING SERVICES

Interested applicants must [subscribe](#) to SRTA's bid posting webpage to receive notices when information and possible RFP addenda become available.

RFP issued March 28, 2018

Proposals must be received no later than
5:00 PM on Tuesday, April 17, 2018

Shasta Regional Transportation Agency
1255 East Street, Suite 202
Redding, CA 96001
(530) 262-6190



2018 SRTA Board Members and Primary Project Partners

Board Members

Susie Baugh, Chair
 Francie Sullivan, Vice Chair
 David Kehoe
 Leonard Moty
 Mary Rickert
 Greg Watkins
 Kristen Schreder

Affiliation

City of Anderson
 City of Redding
 County of Shasta, District 1
 County of Shasta, District 2
 County of Shasta, District 3
 City of Shasta Lake
 Redding Area Bus Authority

Primary Project Partners		
Colusa County Transit Agency	North State Super Region and member MPOs & RTPAs (16 total)	Siskiyou County Local Transportation Commission
Glenn County Regional Transit Committee	Redding Area Bus Authority	Siskiyou Transit and General Express (STAGE)
Glenn Ride	Shasta County Public Works	Tehama County Transit Agency
Lake Transit Authority	Dignity Health Connected Living	Tehama Rural Area eXpress (TRAX)

Introduction

The Shasta Regional Transportation Agency (SRTA) seeks brief proposals from vendors to plan the marketing and outreach for a new electric bus service connecting Redding and Sacramento with feeder routes and local transit systems linking the counties of Shasta, Tehama, Colusa, Siskiyou, Glenn, Lake, Mendocino, Del Norte, Plumas, Modoc, Lassen, Trinity, Humboldt, Butte, Yolo, and Sacramento.

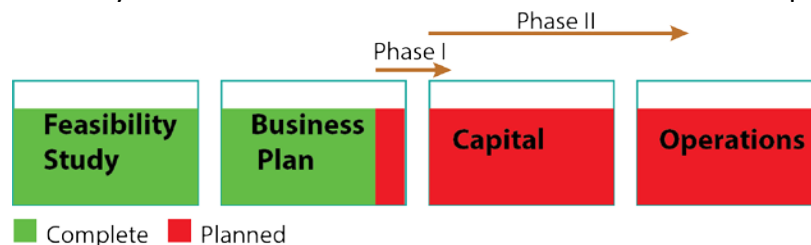
SRTA seeks proposals from qualified consultants to develop a comprehensive outreach campaign and plan for intercity electric bus service between the North State and Sacramento.

Background

Reliable transportation options between Redding and Sacramento are diminishing. North State residents, including disadvantaged communities, increasingly rely on single occupancy vehicles or inconvenient and often unreliable intercity transportation offered by national providers. This is leading to increased greenhouse gas emissions and limited connectivity.

SRTA was awarded a [grant to develop a business plan for the proposed intercity electric bus service](#) to create more transportation options for residents and visitors to the North State and employ cutting-edge, zero-emission bus technology. [Results from a recent survey of North State residents](#) indicate strong support for the intercity service.

Development of the intercity electric bus service has been divided into the four phases below.



In order to transition from the business plan to implementation, SRTA is interested in hiring a consultant to plan outreach for a successful transit service launch with strong and sustainable public demand. SRTA is soliciting brief proposals from vendors for two project phases. A summary of project phase deliverables is outlined below.

Phase I: Outreach Campaign And Plan

- Project management plan
- Outreach events & activities design, planning and materials
- Strategic outreach plan
- Evidence-based branding assistance

Phase II: On-Call Launch Marketing Support

If awarded TIRCP grant funding, SRTA may negotiate a second contract, for Phase II on-call launch marketing support, with the selected vendor.

Project Scope of Work

Submitted proposals must include the tasks outlined below.

Task Overview by Phase	
Phase I	Phase II
Task 1: Project Initiation and Management	Task 1: On-Call Launch Marketing Support (Contingent upon SRTA receiving TIRCP grant funding)
Task 2: Service Branding	
Task 3: Task 3: Develop Outreach Campaign	
Task 4: Develop Strategic Outreach Plan	

Phase I

Task 1: Project Initiation and Management

A kick-off meeting with SRTA and selected consultant will be held at the commencement of the project to establish and agree upon communication protocols, roles & responsibilities, expectations, and to review background information on the region and project. SRTA staff will explain the expected deliverables, progress reports, and invoicing procedures.

Deliverables:

1. Kick-off meeting
2. Project management plan, including the roles of the project manager and other project team members
3. Schedule of project meetings
4. Progress reports that summarize task progress & deliverables in accompaniment of monthly invoices.

Task 2: Service Branding

SRTA received multiple suggestions from staff, stakeholders, and the public on a name for the service. The consultant will take the following steps necessary to brand the intercity bus service:

1. Analyze suggested brand names.
2. Provide SRTA staff evidence-based brand recommendations for successful:
 - a. Names;
 - b. Logos;
 - c. Slogans (especially for transit services) setting the service apart from its competitors; and
 - d. Bus design and color scheme.

Deliverables:

1. Three evidence-based recommendations for a) a service name and b) slogan setting the service apart from its competitors.
2. Three sketch-level recommendations, and one final, for a logo and bus design, including color scheme.

Task 3: Develop Outreach Campaign

The consultant will take the following steps necessary to develop an intercity bus service outreach campaign for implementation by SRTA, primary project partners:

1. Develop an outreach campaign schedule that includes service exposure to, and input from, disadvantaged and underserved populations in the project area (see attached project area map).
2. Develop outreach material including, but not limited to, service fact sheet flyers, public input forms, traditional and platform-specific social media content, etc.
3. Work with SRTA staff to identify suitable, existing, major community events in the North State (E.g. County fairs, Rodeo, Cool April Nights, air shows, etc.) throughout 2018.
4. Develop fun, interactive event activities to engage the public in addition to the on-location bus demonstration(s) SRTA staff will organize.

Deliverables:

1. Outreach campaign schedule
2. Outreach material (English and Spanish)
3. Design, planning, and materials for North State outreach events, including activities and bus demonstration.

Task 4: Develop Strategic Outreach Plan

The consultant will work closely with SRTA and the following primary project partners on the development of a strategic outreach plan for the intercity service:

The consultant will take the following steps necessary to develop a strategic outreach plan:

1. Review and question SRTA staff on the intercity transit system and the need for marketing.
Work with SRTA and primary project partner staff to:
 - a. Identify outreach goals and objectives;
 - b. Identify target groups;
 - c. Develop and execute strategies, including but not limited to positioning, pricing, discounts, and free-ride days, to accomplish identified goals and objectives for maximizing outreach.

Deliverables:

1. Draft strategic outreach plan for approval by SRTA staff.
2. Draft strategic outreach plan for review by SRTA's Board of Directors.
3. Final strategic outreach plan in electronic, SRTA-compatible format, including data and supporting files, with incorporated edits and comments from SRTA staff.

Phase II

Task 1: On-Call Launch Marketing Support (Contingent upon SRTA receiving TIRCP grant funding)

The consultant will work closely with SRTA and the following primary project partners on questions related to the execution of marketing strategies including but not limited to:

1. Timing of executing strategy milestones
2. Unexpected challenges
3. Analysis of competition
4. Monitoring effectiveness and adjusting strategy

Deliverables:

1. Provide on-call outreach support into the operations phase (approximately two years).

Anticipated Project Timeline

Monday, April 25, 2018 – Consultant selection

Thursday, April 30, 2018 – Kickoff meeting

April - December, 2018 – Outreach Events

Monday, May 14, 2018 – Draft strategic outreach plan due

Monday, June 4 – SRTA Technical Advisory Committee meeting

Wednesday, June 6, 2018 - Draft strategic outreach plan for SRTA board adoption due

Tuesday, June 19, 2018 – SRTA Board of Directors meeting

Phase II: July 2018 – June 2020 (approx.) – On-call launch marketing support

Proposal Contents

Desired Skills and Work Experience

- Successful intercity transit marketing experience
- Knowledge of California's North State

This will be a fixed-fee contract based on completion of deliverables. The contract for Phase II will be based on individual task orders for specific items needed and a not-to-exceed budget set at that time. The final scope of work to meet project objectives is negotiable and will be made part of the agreement between SRTA and the selected consultant.

Written proposals shall not exceed seven pages (excluding transmittal letter and resumes). At a minimum, the following information should be included and clearly labeled:

1. **Transmittal letter with statement of understanding of the scope of work** --signed by an officer who may contractually bind the business, including a description of the firm. The proposal shall be a firm offer for a minimum of 90 days and contain a statement to that effect. The proposal shall contain a statement that all activities performed within the proposed scope of work, notwithstanding SRTA unforeseen needs, will be performed at a not-to-exceed price. Please note how the respondent heard of the procurement.

2. **List of the personnel on the project team**, including their relative share of the project workload (by percentage) a brief summary of their qualifications and work experience (resumes may be included and don't count toward page limit). This includes sub-consultants proposed for use. Please note that SRTA must approve any personnel changes in advance.
3. **Representative list of similar projects** completed within the last five years including: project description and services provided, and contact information for the client reference.
4. **Work plan** to complete the project scope of work identifying milestones and deliverables.
5. **Cost proposal worksheet**, including personnel reimbursement rates and a not-to-exceed total cost to complete the project. The cost quote shall be fully inclusive of all services, overhead, and direct expenses. The contract for Phase II will be based on individual task orders for specific items needed and a not-to-exceed budget set at that time.

RFP Questions, Contact Person, and Schedule

Questions

Questions concerning this RFP will be responded to collectively, and made available for interested applicants via the SRTA website. All email inquiries must be submitted no later than 5:00 PM on Wednesday, April 11, 2018, to the below contact person. **Questions taken from prospective vendors, and responded to by SRTA staff, will be reported on SRTA's bid posting webpage.** All responses to questions will be posted on the [SRTA website](http://www.srta.ca.gov) no later than Thursday, April 12, 2018. Interested applicants must subscribe to SRTA's bid posting webpage at <http://www.srta.ca.gov/bids.aspx> so that they are notified of any addenda to the RFP, or for responses to questions received.

Contact Person

Keith Williams, AICP
Associate Transportation Planner
kwilliams@srta.ca.gov
530-262-6192

Schedule

The RFP schedule is as follows.

Tasks	Deadline
Release RFP	March 28, 2018
Interested Vendor Questions Due	5:00 PM, April 11, 2018
SRTA Response to Vendor Questions	April 12, 2018
Vendor Proposals Due	5:00 PM, April 17, 2018 (Email submittals only)
Evaluation and Ranking of Proposals	April 18, 2018
Consultant-SRTA Contract, including Budget and Scope of Work	April 25, 2018
Contract Start	April 25, 2018

Proposal Evaluation

A panel will be formed to evaluate the proposals and make a recommendation to the executive director for approval. The proposal evaluation will be based on the scoring criteria presented in Figure 2.

Figure 2 – Proposal Scoring Criteria

Criteria	Scoring Weight %
Thoroughness of proposal and meeting the RFP project scope of work and the project's overarching objectives	40
Qualifications and similar experience of the consulting firm and project team	20
Proposed budget and value	15
Innovative ideas to meet RFP objectives	15
DBE participation level (all points for DBE/WBE Registration; no points for none)	10

Contract Amount and Award

The anticipated start date for Phase I is April 25, 2018, with a December 31, 2018 contract expiration. The anticipated start date for Phase II, if awarded grant funding, is July 1, 2018, with a June 30, 2020 contract expiration. Consultant selection will be based on a combination funding availability and the value of the services to be provided. \$17,000 is budgeted for Phase I of this project, but larger budgets may be considered for exceptional proposals. Funding for Phase II is contingent upon a TIRCP grant award and will be negotiated as part of contract for that project phase.

Standard Consulting Agreement

SRTA's standard Technical Services Agreement (TSA) will be used for the agreement between SRTA and the selected consultant. SRTA's TSA template is provided by separate attachment to the RFP distribution.

Protest Procedure

Any protests to the executive director recommendation must be made promptly under *Section 2.35.040 (L)(9) - Protest Procedures* of SRTA's purchasing and contracting policies available on the SRTA website under Financial and Accounting Policies & Procedures.

Debriefing

SRTA will provide an informal debriefing to interested consultants not selected for this contract, once a final contract has been negotiated and executed.

Proposal Submittal

Please submit consultant proposals to:

Email: srta@srta.ca.gov

**Attn: Keith Williams, AICP, Associate Transportation Planner
Shasta Regional Transportation Agency**

Submittals must be received by email **only** before **5:00 PM on Tuesday, April 17, 2018**. No proposals will be accepted after this time. Proposal receipt will be acknowledged by email.

The cost of preparing and submitting a proposal, pre-contract meetings, and participating in an interview—if held—are at the sole expense of the proposer. SRTA reserves the right to reject any or all proposals, and to waive any informality, technical defect, or clerical error in any proposal at SRTA's discretion. Solicitation of proposals in no way obligates SRTA to contract with any firm or individual. The decision to approve and award a contract is at the discretion of SRTA.

Public Records Act: All proposals submitted in response to the RFP will become the exclusive property of SRTA. **If there are any trade or proprietary secrets included by the consultant, the consultant may provide a different copy of the proposal that would be acceptable to release to the public. If an alternate document is not made available to SRTA by the consultant, then the original proposal, as submitted, will be released as requested.** Proprietary information can include secret formulas, processes, and methods used in production. It can also include a company's business and marketing plans, salary structure, customer lists, contracts, and details of its computer systems. In some cases, the special knowledge and skills that an employee has learned on the job are considered to be a company's proprietary information.

Modification or Withdrawal of Proposal: Any proposal received prior to the deadline may be withdrawn or modified either personally, through e-mail, or by written request of the consultant. To be considered, the modification must be received in writing (email acceptable) prior to the deadline. Proposals may be withdrawn following the proposal deadline for good cause; please consult with the RFP contact person to discuss this.

RFP Addendum or Addenda: Any changes to the RFP will be made by written addenda issued by SRTA, and shall be considered part of the RFP. The RFP deadline may be extended dependent upon the nature of the changes issued. Upon issuance, such addenda shall be incorporated into the agreement documents, and shall prevail over inconsistent provisions of earlier issued documentation. Any addenda will be posted on-line only. It will be the consultant's responsibility to assure that all addenda are incorporated into the proposal as required according to all the terms and conditions for submittal of the proposal. In no event will SRTA modify the RFP with less than five (5) days remaining to the deadline, without extending the RFP deadline.

Verbal Agreement or Conversation: No prior, current, or post-award verbal conversations or agreement(s) with any officer, agent, or employee of SRTA shall affect or modify any terms or obligations of this RFP, or any contract resulting from this procurement.

Special Funding Considerations: Any contract resulting from this RFP will be financed with funds available to SRTA. The contract for this service is contingent upon the provision of these funds to SRTA. In the event these funds are reduced or eliminated, SRTA reserves the right to terminate or revise any contract.

Alternatives: Consultants may not alter objectives and deliverables of the RFP in the response to the RFP. If the consultant brings to SRTA's attention, at least ten (10) days before the RFP deadline, an alternative end product than the RFP delineates, SRTA reserves the right to cancel the RFP and re-bid the project

DBE Requirement: SRTA has determined that disadvantaged business enterprises, as defined in 49 CFR Part 26, will have the opportunity to compete fairly for contracts financed, in whole or in part, with federal funds. SRTA has a disadvantaged business enterprise (DBE) goal of 4.8% for federal fiscal years 2018/2019/2020. SRTA encourages respondents to include the participation of DBE businesses within your proposal.

Equal Employment Opportunity/Affirmative Action: In awarding a contract to a consultant, SRTA includes language within the contract which requires the consultant to certify their compliance with federal regulations.

North State Intercity Bus

Schematic Transit Service Map

