



PLACER COUNTY
TRANSPORTATION
PLANNING AGENCY

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**REQUEST FOR PROPOSALS (RFP)
FOR CONSULTING SERVICES**

**PLACER COUNTY TRANSPORTATION PLANNING AGENCY
STRATEGIC OUTREACH ON
TRANSPORTATION NEEDS AND FUNDING**

The Placer County Transportation Planning Agency is seeking proposals from qualified consultants to develop and implement a strategic outreach program to increase public awareness and understanding of transportation needs and funding challenges of the south part of Placer County.

Proposals using electronic format should be delivered to:

**Placer County Transportation Planning Agency
Attn: Mike Luken, Executive Director
299 Nevada Street
Auburn, CA 95603-4617
mluken@pctpa.net**

RFP DEADLINE: 3:00 P.M. on Wednesday, August 31, 2022

The RFP deadline is firm. Late proposals will not be accepted.

Prospective consultants should provide an electronic copy of their proposal (PDF Format). It is expected that a contract will be awarded in late October 2022 with work to commence on November 1, 2022.

PCTPA reserves the right to award all or portions of this contract as described in the Request for Proposals. PCTPA is an equal opportunity employer, and women and minority owned businesses (DBEs) are encouraged to apply.

***Questions should be addressed to
Mike Luken, Executive Director, 530-823-4035, mluken@pctpa.net***

**REQUEST FOR PROPOSALS
FOR
STRATEGIC OUTREACH ON TRANSPORTATION NEEDS AND FUNDING
PLACER COUNTY TRANSPORTATION PLANNING AGENCY**

I. PURPOSE OF RFP

The Placer County Transportation Planning Agency (PCTPA) is the designated Regional Transportation Planning Agency (RTPA) for the western slope of Placer County, located in the Sierra Nevada foothills between Sacramento and the Lake Tahoe area. The Agency is also the designated Congestion Management Agency (CMA) for all of Placer County, the Airport Land Use Commission (ALUC), and the designated Transportation Sales Tax Authority. PCTPA also staffs the South Placer Regional Transportation Authority (SPRTA) and the Western Placer Consolidated Transportation Services Agency (WPCTSA). The Sacramento Area Council of Governments (SACOG) is the Metropolitan Planning Organization (MPO) for the area.

PCTPA has worked for many years to develop the funding sources needed to address Placer's transportation infrastructure needs. In 2000, PCTPA identified 20 year transportation needs of \$1.7 billion, versus about \$267 million expected from conventional funding sources over the same period. In 2002, a regional transportation impact fee, known as SPRTA, was adopted, which will generate approximately \$191 million through buildout to help generate some of the needed dollars. Between 2004 and 2006, PCTPA put together a transportation sales tax ordinance and expenditure plan for the November 2006 ballot which at one point, polled at more than 70% support. For a number of reasons, the item was deferred, and by 2007 polling numbers had slipped to 57%, and it was not placed on the 2008 ballot. Work then began on an overlay to the existing SPRTA fee to generate funds specifically for the Placer Parkway; this \$485 million effort is being implemented via a Memorandum of Agreement amongst the four SPRTA jurisdictions adopted in 2010.

In 2013, the PCTPA Board of Directors began a fresh look at our long-range transportation needs and a strategy to fund them. The result of the intensive three year effort was the placement of Measure M on the countywide November 2016 ballot. Measure M proposed to generate \$1.6 billion over 30 years via a ½ cent sales tax to deliver a \$3.5 billion Transportation Investment Plan. The measure, which required a 2/3 majority approval, came up just short at 63.83% support.

Assembly Bill 1413 was signed into law in October 2019 by the Governor permitting the formation of a sub-county sales tax district in the counties of San Diego, Solano and Placer. The proposed district must contain only contiguous cities, and either all the unincorporated area of the county or none of the unincorporated area of the county. If authorized by 2/3 of the voters in the proposed district, AB 1413 permits the revenue from the measure to fund transportation projects that would benefit the proposed district as set forth in the Expenditure Plan. A proposed South Placer County District could be composed of one or more of the contiguous cities/town of Roseville, Rocklin and Lincoln and Loomis. In 2021, the Board decided to focus on Rocklin, Roseville and Lincoln as polling results indicated that the rest of the County and Loomis did not support such a measure.

Now \$3 Billion dollars in transportation improvements in all modes are needed in South Placer over the next 30 years. After applying local impact fees, there is a \$1.0-\$1.2 billion gap in local funding to meet the 50-50 formula to be competitive for state and federal transportation funding programs. Approximately \$1.2 billion could be generated for a proposed 30-year, ½ cent sales tax in the proposed South Placer County District. This very conservative revenue analysis was performed by HDL Companies.

Staff conducted fourteen (14) virtual workshops in April and May 2021 throughout the County to discuss the proposed expenditure plan for a sales tax measure. Results of these workshops confirmed the original March 2020 expenditure plan and reinforced a focus on a South County District, the 80/65 Interchange, widening of Highway 65, funding for city roadway expansions and rehabilitation, public transit, and alternative modes (bike/ped). A larger focus on transit was not supported by these workshops or polling data.

Polling was conducted in June 2021 which resulted in 64 percent support in the cities of Lincoln, Rocklin, and Roseville for a ½ cent transportation sales tax measure. Polling was then conducted in late November/Early December 2021 shortly after the restrictions of the Delta variant were lifted that resulted in 63 percent support for the measure. The Board directed staff to conduct a final poll in April 2022 to determine whether a November 2022 ballot measure is possible or to defer it until 2024. Staff recommended that the polling be near or above the 66.67% special tax threshold to justify a 2022 ballot measure. In April 2022, polling results indicated support for a measure at the 67% threshold, but the soft support dictated waiting until 2024 to potentially place the item on the ballot.

II. SERVICES REQUESTED

PCTPA seeks an individual or firm to assist PCTPA by developing and implementing a strategic educational outreach effort to increase public awareness and understanding of transportation infrastructure needs, funding challenges and the Agency's role in transportation planning, funding and delivery. The success of this effort would be measured by polling to be done by another firm under a separate contract with PCTPA. The date of this next round of polling for FY 2022/23 would be determined in consultation with the successful candidate.

Typical duties might include devising message content and delivery approaches that target various demographics, geographic areas, and interests; identifying and obtaining the participation of the most effective messengers, social media influencers for the outreach effort; developing scripts, PowerPoint presentations, social media components, mass media components, collateral materials, and other outreach materials; arranging, facilitating, and supporting outreach efforts, events and meetings with key demographics subgroups, community groups or officials; developing mechanisms to document and respond to feedback on the outreach effort; incorporating the ongoing feedback from the messaging to refine and improve the outreach effort; and advising PCTPA on "next steps". Attendance at Board meetings may be required on an "as needed" basis.

PCTPA has an existing general outreach and social media program. Over the last two years, a targeted outreach program was created, was implemented, and is summarized at www.keepplacermoving.com. The consultant will develop a plan that clearly identifies an approach and strategy to build and improve the Agency's prior outreach programs. The consultant will undertake an in-depth review of all PCTPA's digital properties, including website, blog, social media and email, as well as the benchmarks for success for each digital channel. The consultant will perform an analysis of the Agency's website statistics to identify the most important content, such as common user paths through the site and potential issues like bottlenecks and ineffective content. The consultant will connect with key Agency leadership and active site users, directly through in-person conversations or indirectly through surveys or other online feedback collection mechanisms. The consultant will look at key indicators that can provide insight into the best way to increase PCTPA's overall communications reach and impact. Taken together, all the information gathered in these audits provides a necessary foundation to develop a detailed technology implementation strategy with achievable and measurable goals. The consultant will produce a project implementation timeline that combines the capabilities of both Agency and consultant team. The technology recommendations will serve

as a roadmap to communicate directly with stakeholders. The development of the strategy will influence the content that is developed to distribute via the technology recommendations. Content is key. At a minimum the Consultant will assist PCTPA in analyzing current efforts, augment and/or creating new channels including but not limited to the following elements for distribution:

- Collateral material that tell the story of the transportation funding needs of Placer County. This material will be distributed to residents, businesses and other interest groups.
- Videos and streaming media that tell the story of the transportation funding needs of Placer County. These video segments will be hosted on the website, microsite and shared in social media.
- Infographics have become quite popular and can significantly boost engagement. The consultant will develop infographics that will portray the transportation needs of Placer County, as it relates to future and long-range transportation funding
- Quarterly Newsletter – Review templates and editorial calendars for the existing PCTPA quarterly newsletter that can be sent to stakeholders. PCTPA’s staff and existing outreach consultant will then be able to execute and distribute the emails following the editorial calendar and using the revised template.
- The consultant will establish monthly social media calendars that identify posts, tweets, etc. for PCTPA or its existing outreach consulting firm to implement.
- Blogging is an essential activity to enhance the search engine optimization and deliver pertinent information to key audiences. The consultant will collaborate with PCTPA to mold and shape the existing monthly blog posts submitted by staff, board members and key influencers.
- Events – PCTPA has placed a focus on community regular quarterly general public events in multiple locations within Roseville, Rocklin and Lincoln. Due to the complexity of transportation funding, events have been one the most effective means to educate the public and thus has dedicated resources in that direction. Business group events (chambers, lions, rotary, etc.) are also important but fewer precious resources will be placed on those types of events as most persons attending have been informed.
- Galleria Kiosk – The Roseville Galleria is the most visited location in South Placer by far. PCTPA has placed an informational kiosk in the center of this facility to educate visitors and shoppers.
- Rocket TV -PCTPA has partnered with Rocket TV is South Placer to place its streaming media in over 50 businesses. PCTPA is also trying a new mobile billboard at events supplied by Rocket TV.

Individuals or firms responding to this RFP should have a demonstrated expertise in strategic outreach efforts, particularly for transportation and funding issues, and knowledge of Placer County. Each proposal should include the following components that shall be included in a finalized contract:

- Strategic communications advice (transportation related recommended)
- Graphic creation and branding support
- Video and Streaming Media design, production, and distribution
- Presentation creation and delivery
- Focus group support
- Public survey consultant coordination (separate consultant contract)
- Online and statistically valid survey development
- Support in the use of innovative public engagement methods and strategies, including virtual reality, social media advertising/influencing sites, etc.

The contract term will be for FY 2022/23 and FY 2023/24. The maximum budget for funding strategy

consultant services for FY 2022/23 is \$7,500 per month, which includes all staffing costs. A separate budget has been set for public surveys/polling. The consultant will assist the Agency in the procurement of a public survey consultant. Additional hard cost including but not limited to advertising, printing, video, mailing, social media and events is \$388,856 for FY2022/23. Hard costs may increase in FY2023-FY2024. A contract start date of November 1, 2022, is anticipated, to be negotiated depending on the proposed work program and budget.

III. GENERAL CONDITIONS

A. **Limitations**

This Request for Proposal (RFP) does not commit PCTPA to award a contract, to pay any costs incurred in the preparation of the proposal in response to this request, or to procure or contract for services or supplies. PCTPA expressly reserves the right to reject any and all proposals or to waive any irregularity or information in any proposal or in the RFP procedure and to be the sole judge of the responsibility of any proposer and of the suitability of the materials and/or services to be rendered. PCTPA reserves the right to withdraw this RFP at any time without prior notice. Further, PCTPA reserves the right to modify the RFP schedule described below.

B. **Award**

PCTPA plans to ask RFP finalists, if required, to present virtual oral presentations regarding their firms and any special expertise in the necessary areas. All finalists may be required to participate in negotiations and submit such price, technical, or other revisions of their proposals as may result from negotiations. PCTPA also reserves the right to award the contract without discussion or interviews, based upon the initial proposals. Accordingly, each initial proposal should be submitted on the most favorable terms from a price and a technical viewpoint. However, selection will be based upon demonstrated competence and professional qualifications necessary for the satisfactory performance of the services required. The price proposal to be provided will be the basis for negotiations to ensure PCTPA receives a fair and reasonable price.

C. **RFP Addendum**

Any changes to the RFP requirements will be made by written addenda by PCTPA and shall be considered part of the RFP. Upon issuance, such addenda shall be incorporated in the RFP documents, and shall prevail over inconsistent provisions of earlier issued documentation.

D. **Verbal Agreement or Conversation**

No prior, current, or post award verbal conversations or agreement(s) with any officer, agent, or employee of PCTPA shall affect or modify any terms or obligations of the RFP, or any contract resulting from this RFP.

E. **Pre-contractual Expense**

Pre-contractual expenses are defined as expenses incurred by proposers and selected contractor in:

1. Preparing proposals in response to this RFP;
2. Submitting proposals to PCTPA;
3. Negotiations with PCTPA on any matter related to proposals; and
4. Other expenses incurred by a contractor or proposer prior to the date of award of any agreement.

In any event, PCTPA shall not be liable for any pre-contractual expenses incurred by any proposer

or selected contractor. Proposers shall not include any such expenses as part of the price proposed in response to this RFP. PCTPA shall be held harmless and free from any and all liability, claims, or expenses whatsoever incurred by, or on behalf of, any person or organization responding to this RFP.

F. Signature

The proposal shall provide the following information: name, title, address, email address and telephone number of the individual with authority to bind the company and also who may be contacted during the period of proposal evaluation. The proposal shall be signed by an official authorized to bind the consultant(s) and shall contain a statement to the effect that the proposal is a firm offer for at least a ninety (90) day period. Execution of the contract is expected by November 1, 2022.

G. Master Agreement and Term

The selected firm must enter into a Master Agreement with PCTPA for provisions related to compensation, conflict of interest, indemnification, insurance, disclosure of information, etc. The specific work tasks shall be indicated via letter(s) of task agreements. The scope, budget, and schedule for the services will be incorporated into the letter(s) of task agreements. The Master Agreement covers a five (5) year period. PCTPA anticipates an initial term of two (2) years and three (3) one-year options to renew if needed. See attached sample Agency agreement.

H. Fiscal Out Clause

The Agreement may be terminated with sixty (60) days' notice for convenience, without further liability other than payment incurred during such fiscal year, should funds not be appropriated by PCTPA to continue services for which the agreement was intended. The Agreement may be terminated for cause with ten (10) days' notice.

I. Insurance

The successful firm shall provide evidence of the following insurance requirements:

1. Workers Compensation; Employer's Liability: Statutory requirements for Workers' Compensation; \$1,000,000 Employers' Liability.
2. Comprehensive Automobile: Bodily Injury/Property Damage \$1,000,000 each accident.
3. General Liability: \$1,000,000 per occurrence naming PCTPA and PCLTA as additional named insureds.

J. Contract Arrangements

The proposer is expected to execute a PCTPA's Master Agreement, which meets the requirements of the federal transportation bill, currently Fixing America's Surface Transportation (FAST) Act.

1. Disadvantaged Business Enterprise (DBE) Policy: It is the policy of the U.S. Department of Transportation that minority- and women-owned business enterprises (hereby referred to as DBE's) as defined in 49 CFR Part 26, shall have the maximum opportunity to participate in the performance of contracts financed in whole or in part with Federal funds. DBE certified consultants are encouraged to submit proposals. PCTPA will not exclude any person from participation in, deny any person the benefits of, or otherwise discriminate against anyone in connection with the award and performance of any contract covered by 49 CFR, Part 26 on the basis of race, color, sex, or national origin.

2. DBE Obligation: The recipient or its contractor agrees to ensure that DBE's have the maximum opportunity to participate in the performance of contracts and subcontracts financed in whole or in part with Federal funds provided under this agreement. In this regard, all recipients or contractors shall take all necessary and reasonable steps in accordance with 49 CFR Part 26 to ensure that DBE's have the maximum opportunity to compete for and perform contracts. Recipients and their contractors shall not discriminate on the basis of race, color, national origin, or sex in the award and performance of DOT-assisted contracts.
3. Title VI of the Civil Rights Act of 1964: The contractor agrees to comply with all the requirements imposed by Title VI of the Civil Rights Act of 1964 (49 USC 2000d) and the regulations of the U.S. Department of Transportation issued thereunder in 49 CFR Part 21.
4. Equal Employment Opportunity: In connection with the performance of the contract, the contractor shall not discriminate against any employee or applicant for employment because of race, color, age, creed, sex, or national origin. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship.

Each proposal, to be considered responsive, must include the following:

- a). A copy of the consultant(s) affirmative action policy (applicable for firms with 50 or more employees); and
- b). A discussion of the consultant(s) program for use of DBE's in the performance of this work, including the following:
 - The names and addresses of DBE firms that will participate;
 - The description of the work each named firm will perform; and
 - The dollar amount of participation by each DBE firm.
5. Conflict of Interest: Firms submitting proposals in response to this RFP must disclose to PCTPA any actual, apparent, or potential conflicts of interest that may exist relative to the services to be provided under Agreement for consulting services to be awarded pursuant to this RFP. If this firm has no conflict of interest, a statement to that effect shall be included on the proposal.

IV. PROPOSAL FORMAT

A qualifying proposal must address all of the following points, in the order shown below:

- A. A brief description of the consultant's firm, including the year the firm was established, type of organization of firm (partnership, corporation, etc.), and any variation in size over the last five years, along with a statement of the firm's qualification for performing the subject consulting services.
- B. A brief summary of the firm's experience with similar outreach/public information efforts.

- C. An organizational chart depicting the individual or team proposed by the firm. A brief summary of the qualifications and experience of each member proposed to provide communications services.
- D. A detailed description and summary graphic representation of the proposed approach and sample work program for the strategic outreach.
- E. A detailed budget and program for staffing the implementation of the program including preparation of advertising, printed material, social media promotion, event sponsorships, etc.
- E. The proposed method of compensation, the hourly rate for principal and employees to be assigned to this Agency and a summary of any other related costs that are to be billed directly, with a total “not to exceed” cost proposal to complete the contract. Proposers may also opt to also provide a monthly retainer price to implement the suggested approach.
- F. A list of references for similar clients, including contact person, email address and phone number.

V. PROPOSAL SUBMITTAL

One (1) electronic copy of the proposal (PDF Format) shall be submitted by email or FTP Link due to large files sizes to mluken@pctpa.net no later than 3:00 pm on Friday, August 31, 2022, at the Placer County Transportation Planning Agency at mluken@pctpa.net. All proposals, whether selected or rejected, shall become the property of Placer County Transportation Planning Agency.

VI. SELECTION PROCEDURE

An evaluation committee will review each proposal for completeness and the responding individuals or firms may be invited for personal or phone interviews prior to final selection, to further elaborate on their proposals.

The Agency reserves the right to award a contract to the firm or individual that presents the proposal which, in the sole judgement of the Agency, best accomplishes the desired results.

The Agency reserves the right to reject any or all proposals, or to waive minor irregularities in said proposal.

The Agency reserves the right to negotiate minor deviations to the proposal(s) with the successful individual or firm.

VII. AWARD CRITERIA

After the evaluation committee has reviewed the proposals and/or interviewed proposing firms, each firm will be rated using the following criteria and rating schedule:

Evaluation Criteria	Rating Points
Specialized experience and demonstrated effectiveness in developing strategic outreach/information efforts for similar public agencies	50
Specific knowledge and understanding of Placer County and key centers of influence	30
Cost proposal	<u>20</u>
Total	100

The top qualified firm will then be recommended to the Board of the Placer County Transportation Planning Agency. The Agency reserves the right to award the contract to the best qualified firm.

VIII. PROJECT TIMETABLE

The schedule for proposal review, consultant selection and project work initiation is as follows:

Issue and distribute RFP	Friday, August 5, 2022
Proposal deadline	Wednesday, August 31, 2022
Finalists contacted to schedule interviews (if needed)	Friday, September 9, 2022
Interviews conducted (if needed)	Friday, September 16, 2022
Contract award	Monday, September 19, 2022
Contract effective date	No later than November 1, 2022

IX. INQUIRIES

Direct all inquiries to:

Mike Luken, Executive Director
Placer County Transportation Planning Agency
299 Nevada Street
Auburn, California 95603
Phone #: (530) 823-4035
mluken@pctpa.net