

THIS PRINT COVERS CALENDAR ITEM NO. : 10.3

**SAN FRANCISCO
MUNICIPAL TRANSPORTATION AGENCY**

DIVISIONS: Sustainable Streets and Communications and Marketing

BRIEF DESCRIPTION:

Authorizing the Director of Transportation to execute six contracts for as-needed consulting services for public outreach and engagement to support capital projects funded through the SFMTA’s \$3.4 billion Capital Improvement Program. The six contracts are with three separate consultants to allow use of local or federal funds on each contract, and for a total amount not-to-exceed \$9,500,000. Each contract is for an initial term not to exceed two years to April 18, 2019, and the option to extend for two additional one-year terms at the Director of Transportation’s sole discretion.

SUMMARY:

- The SFMTA requires assistance to deliver SFMTA projects and service improvements that are critical to achieve the agency’s strategic plan goals, including public facing capital projects that are part of the Capital Improvement Program, such Vision Zero, Muni Forward, and other projects that support the city’s Transit-First and Vision Zero policies.
- As-needed consulting services will directly support the SFMTA’s Public Participation Plan
- The consultant services being procured under the proposed action include the planning and implementation of public outreach and engagement support services, and the design and development of communications materials.
- Davis & Associates Communications and Katz & Associates/Barbary Coast Consulting were the top-ranked proposers for the two locally funded contracts; Circlepoint and the joint venture between Katz & Associates and Barbary Coast Consulting were the top-ranked proposers for the two Federal Transit Administration (FTA) - and two Federal Highway Administration (FHWA)-funded contracts.

ENCLOSURES:

1. SFMTAB Resolution
2. Contract with Davis & Associates Communications, Inc.
3. Contracts with Circlepoint
4. Contracts with the joint venture between Katz & Associates and Barbary Coast Consulting
5. Public Outreach Notification Standards

APPROVALS:

DATE

DIRECTOR 

4/24/17

SECRETARY 

4/24/17

ASSIGNED SFMTAB CALENDAR DATE: May 2, 2017

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PURPOSE

The purpose of this calendar item is to authorize the Director of Transportation to execute six contracts with three separate consultants for as-needed public outreach and engagement services; the total amount for all six contracts is not-to-exceed \$9,500,000. Each contract is for an initial term not to exceed two years to April 18, 2019, with the option to extend for two additional one-year terms at the Director of Transportation's sole discretion.

STRATEGIC PLAN GOALS AND TRANSIT FIRST POLICY PRINCIPLES

This action supports the following SFMTA Strategic Plan Goals and Objectives.

- Goal 1: Create a safer transportation experience for everyone
 - Objective 1.3: Improve the safety of the transportation system.

- Goal 2: Make transit, walking, bicycling, taxi, ridesharing & carsharing the preferred means of travel
 - Objective 2.1: Improve customer service and communications.
 - Objective 2.2: Improve transit performance.
 - Objective 2.3: Increase use of all non-private auto modes.
 - Objective 2.4: Improve parking utilization and manage parking demand.

- Goal 3: Improve the environment and quality of life in San Francisco
 - Objective 3.2: Increase the transportation system's positive impact on the economy.
 - Objective 3.3: Allocate capital resources effectively.
 - Objective 3.4: Deliver services efficiently.

This action supports the following Transit First Policy Principles:

1. To ensure quality of life and economic health in San Francisco, the primary objective of the transportation system must be the safe and efficient movement of people and goods.
2. Public transit, including taxis and vanpools, is an economically and environmentally sound alternative to transportation by individual automobiles. Within San Francisco, travel by public transit, by bicycle and on foot must be an attractive alternative to travel by private automobile.
3. Decisions regarding the use of limited public right of way and sidewalk space shall encourage the use of public rights of way by pedestrians, bicyclists, and public transit, and shall strive to reduce traffic and improve public health and safety.
4. Transit priority improvements, such as designated transit lanes and streets and improved signalization, shall be made to expedite the movement of public transit vehicles (including taxis and vanpools) and to improve pedestrian safety.
5. Pedestrian areas shall be enhanced wherever possible to improve the safety and comfort of pedestrians and to encourage travel by foot.
6. Bicycling shall be promoted by encouraging safe streets for riding, convenient access to

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transit, bicycle lanes, and secure bicycle parking.

7. Parking policies for areas well served by public transit shall be designed to encourage travel by public transit and alternative transportation.

DESCRIPTION

The purpose of the six as-needed contracts is to provide public outreach and engagement support to deliver projects and service improvements that are critical to achieving the SFMTA's Strategic Plan goals. Such projects include, but are not limited to, public-facing capital initiatives that are part of the SFMTA's \$3.4 billion Capital Improvement Program, such as Vision Zero, Muni Forward, and other projects that support the city's Transit-First and Vision Zero policies, such as the Folsom-Howard Streetscape Project, Powell Streetscape Project, Safer Taylor Project, MUNI Equity Strategy, and Geary Bus Rapid Transit.

City voters passed ballot measures in November 2014 to significantly increase local investment in San Francisco's transportation projects. Many of these projects will require significant public outreach efforts to ensure communities are aware of and have the opportunity to engage on projects that impact them. The SFMTA, however, lacks sufficient staffing resources to expeditiously provide high-quality public outreach and engagement services in connection with such transportation projects.

The resources available through these as-needed contracts will also directly support the SFMTA's implementation of its Public Participation Plan, a requirement of the Federal Transit Administration (FTA) that outlines the manner in which the agency expects to engage with the public based on the community's needs and preferences. Insights from a recent update to the [2013 Public Participation Plan](#), currently pending FTA approval, along with the SFMTA's Public Outreach and Engagement Team Strategy (POETS, Enclosure 5), provide guidance on how the agency handles outreach for public-facing projects. This includes methodologies that specifically address linguistic, institutional, cultural, economic, historical, and other barriers that may be preventing minority, low-income, and limited-English proficient (LEP) populations from participating effectively in the SFMTA's decision-making process.

Agency-wide adoption of POETS has increased in line with the public's demand for more robust community outreach and the growth in the number of capital projects that are in various stages of planning and implementation as part of the Capital Improvement Plan. As a result, additional resources are required to ensure the SFMTA can deliver proactive community engagement, well-scoped public participation, and clear communications, with the goal of better decision-making and effective project delivery.

Through as-needed contracts with various, qualified consultants, the SFMTA can utilize unique skill sets as appropriate to help plan and deliver public outreach and engagement services that incorporate best practices and are culturally competent with respect to our stakeholder communities and the public at-large.

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In the summer of 2016, the SFMTA advertised three Requests For Proposals (RFP) soliciting proposals from firms with expertise in public outreach and engagement. The scope of service for each RFP included:

1. Planning for public outreach and engagement.
2. Implementation of public outreach and engagement.
3. Design and development of communications materials.

Because the SFMTA has separate funding sources for its projects (local/state and federal), and thus has different procurement requirements depending upon the source of funds being used, staff had to issue a separate RFP for each of the three funding sources as follows: RFP #SFMTA 2016-38 (locally-funded), RFP #SFMTA 2016-39 (FHWA-funded), and RFP #SFMTA 2016-40 (FTA-funded). Each RFP was issued on July 29, 2016, and provided for the selection of up to two firms and award of up to two contracts for initial terms of two years each. The SFMTA, in its sole discretion, will have the option to extend each contract’s term for up to two one-year option years.

To encourage the consultants to subcontract with smaller, local vendors, each contract has a target participation goal in place for Local Business Enterprises (LBE), Disadvantaged Business Enterprises (DBE), or Small Business Enterprises (SBE), as applicable, depending on the contract’s funding source. The subconsultant participation goal for each contract represents a percentage of the contract value based on the total cost of Task Orders issued. The SFMTA Contract Compliance Office monitors the value of Task Orders issued for each contract, and approves an individual participation goal for each Task Order at the time of issuance. The participation goal, or value, set for each Task Order is then measured against the overall goal set for the contract.

The table below identifies the funding source for each contract, the number and names of firms that submitted proposals in response to the RFPs, and the applicable LBE, DBE, or SBE participation goals.

Contract Funding Source	Number of Proposals Received (Names of Proposers)	LBE/DBE/SBE Participation Goal
LOCAL	4 (Katz & Associates/Barbary Coast Consulting, Davis & Associates Communications, Inc., Circlepoint, and Sitelab)	LBE: 30%
FHWA	4 (Katz & Associates/Barbary Coast Consulting, Circlepoint, Davis & Associates Communications, Inc., and MIG)	DBE: 35%
FTA	5 (Katz & Associates/Barbary Coast	SBE: 35%

	Consulting, Circlepoint, Davis & Associates Communications, Inc., MIG, and Sitelab)	
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A panel comprised of staff from the SFMTA, the SF Public Utilities Commission, and the San Francisco Bay Area Rapid Transit District (BART) evaluated and scored all proposers. The panel conducted evaluations in two-stages – a detailed review of the written proposals followed by oral interviews, at which proposers responded to a standard set of questions.

For the locally funded RFP and two resulting contracts, the proposal from the joint venture of Katz & Associates and Barbary Coast Consulting ranked first, and the proposal from Davis & Associates Communications ranked second. For the two FTA-funded and two FHWA-funded RFPs and resulting contracts, the proposal from the joint venture of Katz & Associates and Barbary Coast Consulting ranked first, and the proposal from Circlepoint ranked second. Staff successfully concluded contract negotiations with the joint venture of Katz & Associates and Barbary Coast Consulting, Davis & Associates Communications, Inc., and Circlepoint. These firms will be the prime consultants, and will be supported by a wide array of subconsultants. Each prime consultant and its respective subconsultant team is listed below, with each subconsultant identified as an LBE, DBE, or SBE, as applicable.

1. Joint Venture of Katz & Associates and Barbary Coast Consulting

- a) 51 West Media
- b) Caribou Public Relations, Inc.
- c) JBR Partners Inc. (LBE, DBE, SBE)
- d) lowercase production (LBE, SBE)
- e) Fairbank, Maslin, Maullin, Metz & Associates, Inc. (FM3 Research)
- f) Greenway Consulting
- g) RDJ Enterprises LLC (LBE, DBE, SBE)
- h) The Participation Company LLC
- i) InterEthnica Inc. (LBE, DBE, SBE)
- j) Seasons Productions
- k) Bang the Table USA LLC

2. Davis & Associates Communications, Inc.

- a) CivicMakers
- b) Greenway Consulting
- c) Corey, Canapary & Galanis Research
- d) InterEthnica Inc. (LBE)
- e) Bang the Table
- f) ACE Mailing (LBE)
- g) Slow Clap Production (LBE)

3. Circlepoint

- a) Fall Line Analytics (LBE, SBE)

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- b) Square One (LBE, DBE, SBE)
- c) Daniller (LBE, DBE, SBE)
- d) InterEthnica Inc. (LBE, DBE)

Pursuant to the respective RFPs, the scopes of services under each of the six contracts will be defined in separate task orders to be issued on an as-needed basis. Depending on the SFMTA division that manages the specific services, either the Director of Sustainable Streets (or designee) or the Director of Communications and Marketing (or designee), at their discretion, will issue task orders to the consultants to perform the services. In certain circumstances, task orders may be issued following a request for competitive bids from each of the two consultants for each funding source. The directors or their designees will select the preferred bid based on a determination of which bid provides the best value. No single consultant is guaranteed assignment of task orders under their contract.

The six contracts proposed to be awarded are:

Item	Contract Number	Type of Funding	Not to Exceed Amount	Firm name
1	SFMTA – 2016-38/1	LOCAL	\$2,500,000	Joint Venture: Katz & Associates/Barbary Coast Consulting,
2	SFMTA – 2016-38/2	LOCAL	\$2,500,000	Davis & Associates Communications, Inc.
3	SFMTA – 2016-39/1	FHWA	\$1,750,000	Joint Venture: Katz & Associates/Barbary Coast Consulting,
4	SFMTA – 2016-39/2	FHWA	\$1,750,000	Circlepoint
5	SFMTA – 2016-40/1	FTA	\$500,000	Joint Venture: Katz & Associates/Barbary Coast Consulting,
6	SFMTA – 2016-40/2	FTA	\$500,000	Circlepoint

All six contracts would be for a total not-to-exceed amount of \$9,500,000 and initial terms not to exceed two years, with options to extend for two additional one-year terms at the Director of Transportation's sole discretion.

STAKEHOLDER ENGAGEMENT

Stakeholder engagement is not required for the award of these contracts, however, the Communications and Marketing and Sustainable Streets divisions will conduct public outreach and engagement for all work performed under each task order issued under the six contracts.

Although stakeholder engagement is not required for the award of these contracts, it is a vital part of the SFMTA's commitment to promoting full and fair participation in public transportation decision-

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making without regard to race, color, national origin, or level of English proficiency. In 2016, the SFMTA updated its Public Participation Plan based on research conducted by the city's Controller's Office.

Quantitative data was collected via a user survey completed by more than 4,700 SFMTA customers. The results of the user survey were complemented by qualitative data collected from 13 executive interviews with representatives of community-based organizations and nine input sessions with SFMTA customers across San Francisco.

With a specific focus on reaching low-income and minority populations, the SFMTA worked with community-based organizations to arrange many of the focus groups to ensure that a diverse set of opinions were heard.

To promote the survey, the SFMTA launched four social media ads with direct links to the survey information in the four following languages: English, Spanish, Chinese, and Filipino. The ads ran for 15 days – from July 19 to August 2, 2016, and reached 70,245 San Francisco residents. The agency also conducted a grassroots outreach effort to engage a broad range of stakeholders in the Public Participation Survey.

Research indicated that the SFMTA's stakeholders vary in their preferences for obtaining information about SFMTA services and meetings. They also have differing preferences for providing feedback and participating in SFMTA's planning processes.

Key conclusions from the research include the following:

- Stakeholders value outreach efforts that are customized to them and their community.
- City residents across demographic groups asserted that they want to attend meetings that have personal relevance, are held in locations that are within their own community, and held at times that are convenient for them.
- Stakeholders would like to see both SFMTA board members and staff attend meetings in their neighborhoods.
- Community meetings held locally are perceived as a direct reflection of the value the SFMTA places on that community, its members, and their perspectives.
- Holding local meetings in familiar places helps to put community members on more equal footing with SFMTA representatives and empowers them to participate in the public process.
- Stakeholders – particularly community based organization (CBO) leaders - would like to see the SFMTA prioritize the public's interests and reach further to communicate information including leveraging email, schools, and neighborhood meetings.
- SFMTA stakeholders place a high priority on acknowledgment that their feedback has been received and – ideally – incorporated into any resulting plans.

The mechanism for incorporating these insights is the agency's POETS. POETS articulates standards for outreach, provides guidance for assessing how projects and programs impact individual communities, and outlines the process for tailoring a communications plan to meet the needs of

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identified communities. It is guide for all staffers engaged in SFMTA projects and programs, and is fully supported by the Communications Division. POETS standards will be amended to better reflect the findings and preferences gleaned from the Public Participation Plan research.

ALTERNATIVES CONSIDERED

The alternative to as-needed services provided under the six contracts is for SFMTA to provide public outreach and engagement using existing resources available within the agency, and procure additional services separately for individual projects. This approach does not support the SFMTA's goal to deliver projects in a timely and effective manner, because contracting for individual projects requires additional time and can be challenging for relatively small projects, particularly when such projects require immediate attention. This alternative is not recommended.

FUNDING IMPACT

The six contracts will be funded on an as needed basis primarily with state and local fund sources, such as Proposition K sales taxes, Transportation and Road Improvement General Obligation Bonds, and possibly federal funding (FTA and FHWA). The total not-to-exceed amount for all six contracts, collectively, is up to \$9,500,000 over the course of the two years; however, the consultants are not guaranteed task orders under their contracts.

ENVIRONMENTAL REVIEW

On March 20, 2017, the SFMTA, under authority delegated by the San Francisco Planning Department, determined that the contracts for as-needed public outreach and engagement services are not defined as a "project" under the California Environmental Quality Act (CEQA) pursuant to Title 14 of the California Code of Regulations Sections 15060(c) and 15378(b).

A copy of the CEQA determination is on file with the Secretary to the SFMTA Board of Directors and is incorporated herein by reference.

OTHER APPROVALS RECEIVED OR STILL REQUIRED

At its January 4, 2016 meeting, the Civil Services Commission approved Personnel Services Contract request No. 41409-15/16 for \$9,500,000 in connection with these contracts. The City Attorney's Office has reviewed the contracts, and there are no other approvals required.

RECOMMENDATION

Staff recommends that the SFMTA Board of Directors authorize the Director of Transportation to execute the following six contracts:

- Contract #SFMTA-2016-38/1 (LOCAL) with the joint venture of Katz & Associates and Barbary Coast Consulting, for As-Needed Public Outreach and Engagement services, for a

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total amount not to exceed \$2,500,000;

- Contract #SFMTA-2016-38/2 (LOCAL) with Davis & Associates Communications, Inc. for As-Needed Public Outreach and Engagement services, for a total amount not to exceed \$2,500,000;
- Contract #SFMTA-2016-39/1 (FHWA) with the joint venture of Katz & Associates and Barbary Coast Consulting, JV for As-Needed Public Outreach and Engagement services, for a total amount not to exceed \$1,750,000;
- Contract #SFMTA-2016-39/2 (FHWA) with Circlepoint for As-Needed Public Outreach and Engagement services, for a total amount not to exceed \$1,750,000;
- Contract #SFMTA-2016-40/1 (FTA) with the joint venture of Katz & Associates and Barbary Coast Consulting, for As-Needed Public Outreach and Engagement services, for a total amount not to exceed \$500,000; and
- Contract #SFMTA-2016-40/2 (FTA) with Circlepoint for As-Needed Public Outreach and Engagement services, for a total amount not to exceed \$500,000.

SAN FRANCISCO
MUNICIPAL TRANSPORTATION AGENCY
BOARD OF DIRECTORS

RESOLUTION No. _____

WHEREAS, The SFMTA's Communications and Marketing Division is responsible for all aspects of the agency's internal and external communications, including community outreach, public relations, social media, marketing, creative services, and the SFMTA public website; and

WHEREAS, The SFMTA's Sustainable Streets Division plans, designs, implements, and maintains the city's transportation infrastructure and regulations to support San Francisco's mobility needs as the city changes and grows; and

WHEREAS, Both divisions require the assistance of consulting resources to support project teams with planning and implementing culturally competent public outreach and engagement for better decision-making and more effective delivery of multi-modal transportation planning, engineering and operational improvement projects; and

WHEREAS, On July 29, 2016, the SFMTA advertised Request For Proposal (RFP) #SFMTA 2016-38 (LOCAL) soliciting proposals from firms with expertise in public outreach and engagement to provide as-needed services in the areas of (1) planning for public outreach and engagement, (2) implementation of public outreach and engagement, and (3) design and development of communications materials; and

WHEREAS, On July 29, 2016, the SFMTA advertised RFP #SFMTA 2016-39 (FHWA) soliciting proposals from firms with expertise in public outreach and engagement to provide as-needed services in the areas of (1) planning for public outreach and engagement, (2) implementation of public outreach and engagement, and (3) design and development of communications materials; and

WHEREAS, On July 29, 2016, the SFMTA advertised RFP #SFMTA 2016-40 (FTA) soliciting proposals from firms with expertise in public outreach and engagement to provide as-needed services in the areas of (1) planning for public outreach and engagement, (2) implementation of public outreach and engagement, and (3) design and development of communications materials; and

WHEREAS, The SFMTA received responsive proposals in response to each Request for Proposal; and

WHEREAS, An evaluation panel comprised of staff from the SFMTA, the San Francisco Public Utilities Commission, and the San Francisco Bay Area Rapid Transit District (BART) reviewed the proposals for all three RFPs, interviewed the proposers, and ranked the proposers; and

WHEREAS, Katz & Associates/Barbary Coast Consulting, as a joint venture, and Davis & Associates Communications, Inc. ranked first and second, respectively in the scoring for the Local RFP, and Katz & Associates/Barbary Coast Consulting, and Circlepoint ranked first and second, respectively in the scoring for all the FTA and FHWA RFPs; and

WHEREAS, The SFMTA's Equal Employment Opportunity office has confirmed the scoring and the proposers' commitment for meeting the respective 30 percent LBE, 35 percent DBE, and 35 percent SBE participation goals for these contracts; and

WHEREAS, SFMTA staff has successfully completed contract negotiations with Katz & Associates/Barbary Coast Consulting, as a joint venture, Davis & Associates Communications, Inc., and Circlepoint; and

WHEREAS, On January 4, 2016, the Civil Service Commission approved these contracts pursuant to Personal Services Contract request No. 41409-15/16; and

WHEREAS, On March 20, 2017, the SFMTA, under authority delegated by the Planning Department, determined that the contracts for As-Needed Public Outreach and Engagement Services are not defined as a "project" under the California Environmental Quality Act (CEQA) pursuant to Title 14 of the California Code of Regulations Sections 15060(c) and 15378(b); and

WHEREAS, A copy of the CEQA determination is on file with the Secretary to the SFMTA Board of Directors and is incorporated herein by reference; now therefore be it

RESOLVED, That the San Francisco Municipal Transportation Agency Board of Directors authorizes the Director of Transportation to execute Contract #SFMTA-2016-38/1 (LOCAL) for As-Needed Public Outreach and Engagement services with Katz & Associates/Barbary Coast Consulting, as a joint venture, for a total amount not to exceed \$2,500,000, and a term not to exceed April 18, 2019 with the option to extend for two additional one year terms at the Director of Transportation's sole discretion; and

RESOLVED, That the San Francisco Municipal Transportation Agency Board of Directors authorizes the Director of Transportation to execute Contract #SFMTA-2016-38/2 (LOCAL) with Davis & Associates Communications, Inc. for As-Needed Public Outreach and Engagement services, for a total amount not to exceed \$2,500,000, and a term not to exceed April 18, 2019, with the option to extend for two additional one year terms at the Director of Transportation's sole discretion; and

RESOLVED, That the San Francisco Municipal Transportation Agency Board of Directors authorizes the Director of Transportation to execute Contract #SFMTA-2016-39/1 (FTA) for As-Needed Public Outreach and Engagement services with Katz & Associates/Barbary Coast Consulting, as a joint venture, for a total amount not to exceed \$1,750,000, and a term not to exceed April 18, 2019, with the option to extend for two additional one year terms at the Director of Transportation's sole discretion; and

RESOLVED, That the San Francisco Municipal Transportation Agency Board of Directors authorizes the Director of Transportation to execute Contract #SFMTA-2016-39/2 (FTA) with Circlepoint for As-Needed Public Outreach and Engagement services, for a total amount not to exceed \$1,750,000, and a term not to exceed April 18, 2019, with the option to extend for two additional one year terms at the Director of Transportation's sole discretion; and

RESOLVED, That the San Francisco Municipal Transportation Agency Board of Directors authorizes the Director of Transportation to execute Contract #SFMTA-2016-40/1 (FHWA) for As-Needed Public Outreach and Engagement services with Katz & Associates/Barbary Coast Consulting as a joint venture, for a total amount not to exceed \$500,000, and a term not to exceed April 18, 2019, with the option to extend for two additional one year terms at the Director of Transportation's sole discretion; and be it further

RESOLVED, That the San Francisco Municipal Transportation Agency Board of Directors authorizes the Director of Transportation to execute Contract #SFMTA-2016-40/2 (FHWA) with Circlepoint for As-Needed Public Outreach and Engagement services, for a total amount not to exceed \$500,000, and a term not to exceed April 18, 2019, with the option to extend for two additional one year terms at the Director of Transportation's sole discretion.

I certify that the foregoing resolution was adopted by the San Francisco Municipal Transportation Agency Board of Directors at its meeting of May 2, 2017.

Secretary to the Board of Directors
San Francisco Municipal Transportation Agency