

## STAFF REPORT

- SUBJECT:** Shortlist of Marketing/Communication Service firms for SJCOG Overall Work program (OWP) Activities
- RECOMMENDED ACTION:** Approve Shortlist of Marketing/Communications Service firms for a Period of Five Years and Authorize the SJCOG Executive Director to Negotiate and Sign Contracts on a Task Order Basis for approximately \$150,000 per year, not-to-exceed \$750,000 for five years

**SUMMARY:**



The SJCOG Board approved extensive planning activities with the adoption of an \$11 million budget for this fiscal year. The dibs (travel demand management program) comprises approximately \$1.5 million of the adopted budget. Two SJCOG staff vacancies—one in the dibs program and one in the SJCOG communications program --require resources to fulfill work commitments in the adopted Overall Work Program. Two strategies have been developed to maintain continuity of SJCOG business operations which include (1) shifting responsibilities to existing staff and (2) securing consulting assistance, in lieu of filling the two vacant positions.

This staff report seeks approval of an “on-call” list comprised of marketing and communications firms to augment in-house resources. The list of consultants will be used to design, develop and implement products and services including: travel demand marketing, education, public engagement, communications, and community outreach services for all of SJCOG program areas, including Measure K and the dibs program which are among the most visible activities at SJCOG.



SJCOG issued a Request for Qualification (RFQ) and ten firms responded with Statement of Qualifications (SOQ's). SJCOG is recommending approval of a shortlist of the following six firms (in alphabetical order):

- 1) Circlepoint, Oakland
- 2) MHD Group, Modesto
- 3) MIG, Berkeley
- 4) Never Boring, Modesto
- 5) Port City, Stockton
- 6) Southwest Strategies, Fresno

### **RECOMMENDATION:**

SJCOG staff recommends that the SJCOG Board approve the “on call” list for a period of five years (from December 2019 to December 2024) and authorize the Executive Director to negotiate and enter into contracts with firms (on a task order basis) for the provision of marketing and communications services.

### **FISCAL IMPACT:**

The budget for this contract will not exceed \$750,000 over the five-year contract period. This is approximately \$150,000 a year. It is anticipated that this amount will fluctuate annually but the authorization of services will be constrained by the not-to-exceed five-year total. The cost for these services will be paid via budgeted funds from the relevant program area and will come from salary savings of the vacant Associate Program Specialist and Senior Communications Officer positions. The communications needs are varied in each work element, and the work from the on call list will be paid out of each respective work element. Because the list has a five-year duration, future marketing/communications budgets are subject to Board approval as part of the annual Overall Work Program process.

### **BACKGROUND:**

As stated earlier, SJCOG is not recruiting for the Senior Communications Officer and the dibs Associate Program Specialist. In lieu of filling the positions, SJCOG has reorganized the communications team, shifting some responsibilities to existing staff. Notably, SJCOG has merged the dibs and communications divisions of SJCOG to enhance cohesion of overall communications, thereby maximizing the utilization of existing staff skills. Augmenting this approach with consulting assistance will provide SJCOG the flexibility to have experts on call for varying communication needs. It will also infuse innovative tools and bring in high level experts (i.e. individuals with 20+ years of experience) from the industry on an as needed basis. The on-call list will be tapped throughout the five years for a variety of projects for all program areas of SJCOG to communicate goals and project accomplishments, MK projects and support dibs to market and promote program benefits, as well as increase awareness and engagement.



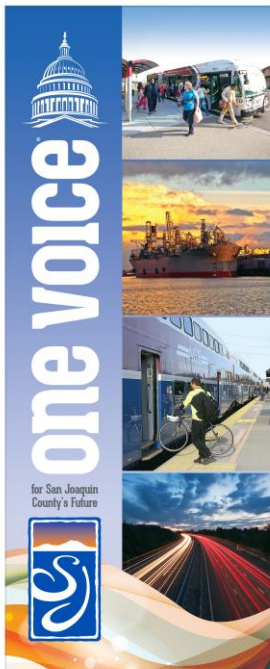
### SJCOG General Communications and Marketing Needs:

- Marketing and Advertising for the dibs travel demand management program
- Public relations and communications
- Event Planning
- Visual communication strategies
- Website design and development
- Market research and analysis
- Strategic planning
- Social media strategies
- Measure K, dibs, SJCOG branding



Some specific deliverables from the shortlist are as follows:

- Familiarize the public about SJCOG's roles and responsibilities
- Establish brand recognition for SJCOG, Measure K and dibs program
- Expand social media presence for SJCOG
- Develop innovative tools to help enhance SJCOG visibility in the community
  - Showcase Measure K project accomplishments
  - Develop marketing strategy to roll out Measure K videos
  - Develop strategies to market public workshops, create materials, educate the public and increase public participation and stakeholder engagement for the RTP/SCS
  - Strengthen brand recognition and increase awareness for dibs program
  - Increase public participation and stakeholder engagement for dibs program
  - Educate and elevate customer experience through innovative methods and tools
  - Implement various public outreach activities for the individual planning projects as laid out in SJCOG's Public Involvement Program.
  - Event planning efforts for ribbon cuttings/ground breakings, community forums, public workshops, census speaker series seminars.



## Solicitation Process

- 1) On September 16, 2019, a Request for Qualifications (RFQ) was issued to solicit SOQ's from firms to develop for an on-call list for SJCOG, dibs, and Measure K program initiatives. Proposers were asked to respond to an anticipated scope of services and demonstrate their experience and expertise through examples and description of services. The deadline for responses was October 15, 2019. The deadline was extended to November 1, 2019 to provide more time for firms to respond.
- 2) The RFQ was sent to firms subscribed to SJCOG's Bid Posting Notification, the Environmental Justice List comprised of community groups representing the under-served, social services groups and SJCOG's database of Marketing, Graphic Design and Public Relations firms. It was also posted to the SJCOG website and social media pages.

## Review and Selection Process

SJCOG received 10 Statements of Qualification (SOQ) in response to the RFQ solicitation. The firms who submitted were (in random order): Port City (Stockton), Cummings Design (Lodi), Imagen (Riverbank), MHD Group (Modesto), Never Boring (Modesto), Southwest Strategies (Fresno), MIG (Berkeley), Circlepoint (Oakland), The Knowledge Stack (Los Angeles), and BBPR, Inc. (Los Angeles).

A review committee, comprised of three staff members that represented the agency's divisions of dibs, Communications, and Planning/Programming, reviewed and scored the responses based on the following criteria:

Criteria	Points
1. Demonstrated creativity and development of products and/or services	35
2. Level and range of experience and expertise as it pertains to Scope of Services	35
3. Cost-Effectiveness	30



SJCOG staff wanted to ensure that the list provided an array of services to meet the needs of SJCOG over the next five years. Selected firms must have strong marketing and communications teams that will provide great value to SJCOG in advancing its programs.

In addition, SJCOG staff felt it was important to have a shortlist with a reasonable expectation to have all firms be able to secure work.

The review committee carefully reviewed all proposals against the criteria listed above and

identified the following six firms as the best fit for the needs of the on call list.

Firms Recommended for On-Call List	
	• Port City, Stockton
	• MHD Group, Modesto
	• Never Boring, Modesto
	• Southwest Strategies, Fresno
	• MIG, Berkeley
	• Circlepoint, Oakland

**Next Steps:**

Following Board action, the SJCOG Executive Director will negotiate contacts with individual firms on a project-by-project basis via task orders.

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