



March 4, 2021

AFFILIATED AGENCIES

*Orange County
Transit District*

*Local Transportation
Authority*

*Service Authority for
Freeway Emergencies*

*Consolidated Transportation
Service Agency*

*Congestion Management
Agency*

*Service Authority for
Abandoned Vehicles*

**SUBJECT: Request for Proposals (RFP) 1-3216
“Pacific Surfliner Social Media and Passenger
Communications”**

Gentlemen/Ladies:

This letter shall serve as Addendum No. 2 to the above RFP issued by the Orange County Transportation Authority (Authority). Offerors are reminded that the proposal submittal date is at or before **2:00 p.m., March 10, 2021**.

A pre-proposal conference was conducted via teleconference on February 24, 2021. The pre-proposal registration sheet is presented as Attachment A.

Questions submitted by the deadline and the Authority's responses are presented as Attachment B to the Addendum No. 2.

Offerors are reminded to acknowledge receipt of this Addendum No. 2 in their transmittal letter and Exhibit B, “Price Summary Sheet.” All changes addressed in this Addendum No. 2 shall be incorporated into the final Agreement.

Questions regarding this Addendum No. 2 should be directed to the undersigned at aperez@octa.net.

Sincerely,

Agueda Perez
Contract Administrator
Contracts Administration and Materials Management



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3216

Date: Wednesday, February 24, 2021

Title: Pacific Surfliner Social Media and Passenger Communications

1. **Company Name:** RockSpark Inc.

Attendee: RockSpark Inc. CEO Robin Rockey, APR

Address: 27454 Sereno

City, State Zip: Mission Viejo, CA 92691

Phone Number: (949) 407-9544 **Registered on CAMM NET?** ☒ Yes ☐ No

Prime ☒ **Sub** ☐

E-Mail Address:

2. **Company Name:** _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () **Registered on CAMM NET?** ☐ Yes ☐ No

Prime ☐ **Sub** ☐

E-Mail Address:

3. **Company Name:** _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () **Registered on CAMM NET?** ☐ Yes ☐ No

Prime ☐ **Sub** ☐

E-Mail Address:



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3216

Date: Wednesday, February 24, 2021

Title: Pacific Surfliner Social Media and Passenger Communications

1. Company Name: ROX United

Attendee: Jennifer Mull, Lisa Ruiz-Rogers

Address: 300 Pacific Coast Highway, #200

City, State Zip: Huntington Beach, CA 92648

Phone Number: (714) 794.6400 Registered on CAMM NET? ☒ Yes ☐ No

Prime ☒ Sub ☐

E-Mail Address: jmull@unitedcollective.com

2. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐

E-Mail Address:

3. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐

E-Mail Address:



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3216

Date: Wednesday, February 24, 2021

Title: Pacific Surfliner Social Media and Passenger Communications

1. **Company Name:** Adorn Group
- Attendee:** Robbie Dye
- Address:** 7284 Murdy Circle
- City, State Zip:** Huntington Beach, California 92647
- Phone Number:** (949) 735-6769 **Registered on CAMM NET?** ☒ Yes ☐ No
- Prime** ☒ **Sub** ☐
- E-Mail Address:**

R	O	B	B	I	E	@	A	D	O	R	G	R	O	U	P	.	C	O	M		
---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	--	--
-
2. **Company Name:** Adorn Group
- Attendee:** Riley Carr
- Address:** 7284 Murdy Circle
- City, State Zip:** Huntington Beach, California 92647
- Phone Number:** (978) 806-1408 **Registered on CAMM NET?** ☒ Yes ☐ No
- Prime** ☒ **Sub** ☐
- E-Mail Address:**

R	I	L	E	Y	@	A	D	O	R	G	R	O	U	P	.	C	O	M		
---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	--	--
-
3. **Company Name:** Adorn Group
- Attendee:** Jason DeLuca
- Address:** 7284 Murdy Circle
- City, State Zip:** Huntington Beach, California 92647
- Phone Number:** (917) 232-2588 **Registered on CAMM NET?** ☒ Yes ☐ No
- Prime** ☒ **Sub** ☐
- E-Mail Address:**

J	A	S	O	N	@	A	D	O	R	G	R	O	U	P	.	C	O	M		
---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	--	--



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3216

Date: Wednesday, February 24, 2021

Title: Pacific Surfliner Social Media and Passenger Communications

1. Company Name: Hyatt Ward Advertising, Inc.
Attendee: Adrian Hyatt Ward
Address: 1706 Plum Lane, Suite 103
City, State Zip: Redlands, CA 92399
Phone Number: (909) 793-3840 x.223 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐
E-Mail Address: A D R I A N @ H Y A T T W A R D - C O M

2. Company Name: Hyatt Ward Advertising, Inc.
Attendee: Richard Lee
Address: 1706 Plum Lane, Suite 103
City, State Zip: Redlands, CA 92399
Phone Number: (909) 793-3840 x.222 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐
E-Mail Address: R I C H A R D @ H Y A T T W A R D - C O M

3. Company Name: Hyatt Ward Advertising, Inc.
Attendee: Brock Browner
Address: 1706 Plum Lane, Suite 103
City, State Zip: Redlands, CA 92399
Phone Number: (909) 793-3840 x.226 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐
E-Mail Address: B R O U K @ H Y A T T W A R D - C O M



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3216

Date: Wednesday, February 24, 2021

Title: Pacific Surfliner Social Media and Passenger Communications

1. **Company Name:** Brown Marketing Strategies, Inc.

Attendee: Shannon Brown and Chloe Larriategui

Address: 2837 Presidio Drive

City, State Zip: San Diego, CA 92110

Phone Number: (619) 546-5390 x101 **Registered on CAMM NET?** ☒ Yes ☐ No

Prime ☒ **Sub** ☐

E-Mail Address: s h a n n o n @ b r o w n c a n d o . c o m

2. **Company Name:** _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () _____ **Registered on CAMM NET?** ☐ Yes ☐ No

Prime ☐ **Sub** ☐

E-Mail Address:

3. **Company Name:** _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () _____ **Registered on CAMM NET?** ☐ Yes ☐ No

Prime ☐ **Sub** ☐

E-Mail Address:



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3216

Date: Wednesday, February 24, 2021

Title: Pacific Surfliner Social Media and Passenger Communications

1. **Company Name:** NLG Communications

Attendee: Naomi Goldman, Principal (not enough spaces below for business email: naomi@nlgcommunications.com)

Address: 11041 Santa Monica Blvd. #319

City, State Zip: Los Angeles, CA 90025

Phone Number: (424) 293-2113 **Registered on CAMM NET?** ☒ Yes ☐ No

Prime ☒ **Sub** ☐

E-Mail Address: n g o l d m a n 7 7 @ g m a i l . c o m

2. **Company Name:** _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () **Registered on CAMM NET?** ☐ Yes ☐ No

Prime ☐ **Sub** ☐

E-Mail Address:

3. **Company Name:** _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () **Registered on CAMM NET?** ☐ Yes ☐ No

Prime ☐ **Sub** ☐

E-Mail Address:



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3216

Date: Wednesday, February 24, 2021

Title: Pacific Surfliner Social Media and Passenger Communications

1. Company Name: Barrios & Associates, LLC (dba Communications LAB)

Attendee: Arianna Barrios & Kelsey Eiben

Address: 701 E Chapman Avenue

City, State Zip: Orange, CA 92866

Phone Number: (949) 215-5539 Registered on CAMM NET? ☒ Yes ☐ No

Prime ☒ Sub ☐ ARIANNA@COMMUNICATIONSLAB.COM

E-Mail Address:

2. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐

E-Mail Address:

3. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐

E-Mail Address:



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP #: 1-3216

Date: Wednesday, February 24, 2021

Title: Pacific Surfliner Social Media and Passenger Communications

1. Company Name: RSCA Corporation

Attendee: Schenae Rourk

Address: 4712 Admiralty Way, Unit 633

City, State Zip: Marina Del Rey, CA 90292

Phone Number: (3 1 0) 3 5 6-7 6 1 9 Registered on CAMM NET? ☒ Yes ☐ No

Prime ☒ Sub ☐

E-Mail Address: outreach@redwoodresources.net

2. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐

E-Mail Address: _____

3. Company Name: _____

Attendee: _____

Address: _____

City, State Zip: _____

Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No

Prime ☐ Sub ☐

E-Mail Address: _____

No.	Question	Authority's Response
1	Can you please elaborate on the extent of the website design and development work mentioned in the Scope of Work, Task 3? Is this specific to the blog?	The LOSSAN Agency has the ability to create webpages and blog articles in-house, which should be a sufficient level of web support for this scope. The items under Task 3, job delivery, are meant as a guide for additional support that may be required for more advanced integrations, should there be a need. The firm should have the capabilities to fully complete the deliverables outlined in the scope of work.
2	Apologies if this was missed in the RFP, but which channels does this Scope cover?	The official Pacific Surfliner social channels include Facebook, Twitter, and Instagram.
3	Pending Covid travel restrictions, is the consultant expected to meet in-person monthly and/or quarterly for the reporting?	Meetings can be held remotely as long as the proper collaborative tools are in place.
4	Is the anticipated/contract start date of this project June 1, 2021?	It is anticipated that this contract will begin by mid June.
5	Can you confirm that the paid media budget will be a separate from the fixed price cost?	Yes, the \$200,000 budget is for completing the specific deliverables outlined in the scope of work. Paid media is purchased by the LOSSAN Agency directly, outside of this scope of work.
6	Can you provide information on 'deals' or 'vouchers' that can be used as incentives throughout the engagement and who drives those (the agency)?	The LOSSAN Agency has the ability to secure vouchers for official sweepstakes and contests that are hosted by the LOSSAN Agency. The vouchers can be redeemed by the winner for travel on the Pacific Surfliner, with certain terms and conditions. The LOSSAN Agency can also develop limited-time promotions for Pacific Surfliner travel, such as a percentage off the regular adult fare, to use as part of marketing campaigns.
7	Can you provide information about the blog requirement (how long, where do you see this being posted, etc.)?	There is not a specific length requirement for the blog. The goal of blog articles is to motivate action among readers and reflect the personality, vision, and values of the Pacific Surfliner brand. The content calendar will inform blog article topics. The blog articles will be posted here: https://www.pacificsurfliner.com/blog
8	What access with the agency have to your photography and videography team (can we make requests, etc.)?	The LOSSAN Agency has a library of videos and photos that can be leveraged for social media posts. While it might be possible to request assistance from other vendors, the firm should have the capabilities to fully complete the deliverables outlined in the scope of work.
9	Do you require/ are you eligible for a General Services Administration (GSA) rate schedule?	The price summary sheet must include the total cost to complete all of the deliverables of each task. As a firm-fixed contract per diem rates are not acceptable.
10	Could OCTA give us more information or any public records about LOSSAN's past vendor, such as an evaluation sheet?	This information is found through a Public Records Request, please submit your request at: http://octa.net/About-OCTA/Support/Public-Records-Request .

11	What scheduling software is the current department using, and would they be willing to switch?	The LOSSAN Agency does not directly license a platform for scheduling posts. Staff are willing to leverage new platforms to enhance performance, and additional tools may be considered and implemented as enhancements to the scope of work dependant on the cost and impact, at the discretion of the LOSSAN Agency. Any software or tools considered mandatory by the firm should be spelled out as an exception/deviation. Alternatively, the cost of any technology or platforms that the firm requires must be included in the estimates to complete the specified deliverables within a task.
12	Would you be able to send us the powerpoint that you were using during the meeting? We could not find it on the website.	The powerpoint presentation used during the preproposal conference can be found via CAMMNET website, by downloading Addendum number 1.
13	I have a question regarding the stated budget of USD \$200,000 for the one-year initial term: Does the budget cover only the professional services and support offered by the selected firm for the one-year initial term?	The \$200,000 budget is for completing the specific deliverables outlined in the scope of work.
14	If yes, will there be additional funds/budgets made available for paid media/advertising efforts/initiatives recommended by the selected firm? For example: paid social media advertising or paid out-of-home billboards.	Paid media can be purchased by the LOSSAN Agency directly. The budget we allocate for digital advertising ranges seasonally. We generally establish influencer and partner programs as trade (in-kind). For example, we can book complementary travel for an influencer in exchange for coverage of the service.
15	Whether companies from outside USA can apply for this? (like, from India or Canada)	Yes, as long as the firm can provide the services in the scope of work.
16	Whether we need to come over there for meetings?	Meetings can be held remotely as long as the proper collaborative tools are in place.
17	Can we perform the tasks (related to RFP) outside USA/ (like, from India or Canada)	Yes, as long as the firm can provide the services in the scope of work.
18	Can we submit the proposals via email?	Yes, proposals must be submitted electronically through the following URL link: https://www.octa.net/Proposal_Upload_Link at or before 2:00 p.m. on March 10, 2021 select "RFP 1-3216" from the drop-down menu and follow the instructions as prompted.
19	Can the standing marketing plan cited in Exhibit A, page 9 be shared?	Please find a summary of marketing strategies and programs in Section V (Appendix) of the scope of work. Additional information can be found in the Marketing section of the LOSSAN Agency Business Plan: http://www.octa.net/pdf/LOSSAN_Business_Plan_FY_19-20_and_FY_20-21.pdf
20	With regard to designing campaign creative, what is the expected division of labor between the in-house marketing team's role in the production of premium content, optimized posts, static ads, and video production? Are there any relevant design capabilities currently not available in-house?	The firm should have the capabilities to fully complete the deliverables outlined in the scope of work, including the development of optimized posts, social media content, advertisements, video stories, etc.

21	Do we understand correctly that LOSSAN does not seek more than 13 posts a month from the Consultant? (8 evergreen, 2 premium, 1 optimized post, influencer post, and an archival evergreen post)	All of the deliverables are outlined in the scope of work. As outlined in Task 3, eight social posts would be versioned out for each of the three Pacific Surfliner channels (Facebook, Twitter, and Instagram) for a total of 24 monthly posts. There is also one blog post, and two pieces of premium content, per month (which might include polls, video stories, etc.) Influencer partnerships are independent of the monthly content, as outlined in the Task 2 deliverables.
22	Have specific, measurable growth targets for both ticket sales and web traffic been adopted? (Exhibit A, page 2, if so, can they be shared?	The LOSSAN Agency would expect the firm to suggest some performance metrics as part of the strategy document outlined in Task 1, as well as reporting in Task 6. Of course, performance measures have shifted during the pandemic from website traffic and travel bookings to awareness and engagement.
23	Does the marketing team currently use a social media management platform, like Sprout?	The LOSSAN Agency does not have a social media management platform. Additional tools may be considered and implemented as enhancements to the scope of work depending on the cost and impact, at the discretion of the LOSSAN Agency. The expectation, however, is that the work can be completed in the current state without additional tools. Any tools considered mandatory by the firm can be spelled out as an exception/deviation. Or the cost of any technology or platforms that the firm requires can be included in the estimates to complete the specified deliverables within a task.
24	Can background information of the current "always on" social media marketing program be shared? (Exhibit A, page 3)	The "always on" marketing program consists of ongoing advertising that boosts high-performing posts, grows the fan base, and drives website traffic among new audiences. However, advertising has been put on hold due to the pandemic, so social media has been important for engaging current fans organically. Additional background on marketing activities is available in the Scope of Work in Section V. Appendix.
25	Who currently manages LOSSAN's social media program? With regard to community management deliverables (Exhibit A, page 6) will the Consultant have full access to PS social media accounts? How many people will have publishing access to PS social feeds?	The social media program is managed as a partnership between the LOSSAN Agency and the social media and digital communication Consultant. Specific community management deliverables are outlined in the scope of work under Task 4. Any activities outside of the scope of work are handled by the LOSSAN Agency. The awarded Consultant will have full access to the Pacific Surfliner social media accounts to complete tasks in the scope of work. The number of people with access depends on the size of the team performing work on the contract.
26	Have previous marketing exercises developed personas of PS riders? If so, can they be shared?	LOSSAN Agency has done some work to identify personas, but we expect that additional work would be done under the social media strategy outlined in Task 1.
27	Are there any time/day requirements to be on-site at the offices of LOSSAN or other entities associated with this contract?	Meetings can be held remotely as long as the proper collaborative tools are in place.

28	Does the \$200,000 budget for this effort include the budget for paid media? Is the Contractor expected to set budgets and schedule ads within the various platforms' ad management systems, or does LOSSAN staff do this?	The \$200,000 budget is for completing the specific deliverables outlined in the scope of work. Paid media can be purchased by the LOSSAN Agency directly. The budget we allocate for digital advertising ranges seasonally. The specific deliverables for paid media are outlined in the scope of work. It's expected that the monthly advertising plan would include strategy, budgets, timelines, and more. As outlined in the scope of work, an optimized advertising placement would be built by the firm.
29	On page 10 of the Proposal Content, number 3 under Proposed Staffing and Project Organization, the RFP asks the Proposer to provide a table projecting the labor-hour allocation to the project by individual task. Could you provide an example of the type of table you're looking for? In addition, is there a reason Proposer needs to project the labor-hour allocation by individual task at this time since the price summary sheet asks for a total firm-fixed price?	Section II. Proposal Content, page 10, underneath the Heading Proposed Staffing and Project Organization number 3 is requesting the offerors indicate adequacy of labor resources utilizing a table projecting the labor-hour allocation to the project by individual task. The table provided by the offerors is at the firm's discretion, this is requested, so that the proposing firm can provide an estimate of how many labor hours it will take to complete the SOW by Task.
30	What is the total annual budget or "not to exceed" budget for each year of this campaign?	The budget for the initial Term one-year term of the Agreement is \$200,000. Annual budgets for Option Terms will be determined each year of the Agreement.
31	What's the average Annual Paid Social Media costs?	Paid media is purchased by the LOSSAN Agency directly (does not come out of the contract budget). The annual cost ranges based on agency goals, marketing campaigns, etc. Pre-pandemic, the LOSSAN Agency has spent approximately \$100,000 annually on social media advertising. But advertising activities have been largely reduced or paused during the pandemic, resulting in an expected decrease in the annual spend on social media advertising. The budget is expected to be no more than \$50,000 annually for social media advertising in the near-term, with investment levels determined by the LOSSAN Agency based on a number of factors.
32	Crisis Communications - social media is but one component. What are your expectations within this scope and how will they fit in to your broader plan?	The expectation for this deliverable (Task 2, number 3) is related only to the social media component of the LOSSAN Agency's crisis communication plan. The LOSSAN Agency works with the operator of the Pacific Surfliner service on a broader crisis communications plan that covers public relations and other areas. The crisis communications plan deliverable in this scope of work will guide communication efforts on the channels that the LOSSAN Agency controls, namely the official Pacific Surfliner social media accounts. It's meant to complement the broader plan.
33	Influencers/Coop campaigns - Paid/Unpaid?	The LOSSAN Agency generally establishes influencer and partner programs as trade (in-kind). For example, we can book complementary travel for an influencer in exchange for coverage of the service. There is no budget established outside of this scope of work for paid influencer partnerships.
34	Do you have a geographical preference for the Vendor to be located? We are located locally in San Diego and Los Angeles (45 minutes away should you need us in person) but have sub vendors we'd like to include from DC and Sacramento.	The Authority does not have a geographical preference.

35	Who is the incumbent vendor. Prior contract was listed at \$400K. Was that disrupted by Covid 19?	The incumbent vendor is GoSeeTell Network (dba) Sparkloft Media. Prior contract was approved for \$200K, and the total contract value was not affected by COVID-19.
36	Price Summary Sheet - Does the task sheet need to include Paid Media?	Yes, please refer to the answer for question 31.
37	Community Management – set hours/24/7 operation and what types of questions/comments will the vendor be responsible for responding to?	The social media program is managed as a partnership between the LOSSAN Agency and the social media and digital communication Consultant. Specific community management deliverables and details about expected interactions are outlined in the scope of work under Task 4. Any activities outside of the scope of work are handled by the LOSSAN Agency. Responses are expected only during regular business hours.
38	Is vendor expected to provide or build a database for question/response tracking?	Task 4, deliverable 2 is more about content (identifying and documenting common questions and related answers for reference). This can be done through basic software such as Microsoft Word or Excel. There is not an expectation that a software would be built to host the responses.
39	Video Stories – what is the expectation? Does video production need to be budgeted for?	Video stories are a sample of the premium content that could be delivered under Task 3. Premium content can also include specialized ads, polls, social media stickers, etc. The premium content would be informed by the social strategy in Task 1. The LOSSAN Agency has a library of photos and videos that can be leveraged for social media. The firm should have the capabilities to fully complete the deliverables outlined in the scope of work, including the development of premium content (which may include video stories).
40	Reporting – Social Analytics/Listening tools? Are there any existing that we will be using?	The LOSSAN Agency does not have a social media analytics tool or listening platform. Any tools considered mandatory by the firm can be spelled out as an exception/deviation.
41	What will performance of chosen agency be based upon?	The Authority will evaluate the offers received based on the following weight criteria: 25% Qualifications of the Firm; 25% Staffing and Project Organization; 30% Work Plan, and 20% Cost and Price. For more detail information, please refer to Section III. Evaluation And Award in the RFP package.
42	What is the capacity of web support?	The LOSSAN Agency has the ability to produce web pages in-house, but the firm should have the capabilities to fully complete the deliverables outlined in the scope of work. Any additional support considered mandatory by the firm can be spelled out as an exception/deviation.
43	Languages/Demographics? Anything beyond English required?	At this time, the Pacific Surfliner social media channels are only provided in English.

44	Can we propose online promotions as regards planned activities?	Yes, online promotions can be proposed.
45	Is there a conflict of interest if we are the AOR for another Amtrak Agency or have done work for Amtrak at a National level?	No, there is no conflict of interest.
46	Should the References included be for the prime contractor only or can subcontractor references also be included?	A minimum of 3 references is required. It is recommended that the 3 required references be for the prime. Additional references can be provided for the subcontractor and must be identified as such.
47	Can we use electronic signatures on forms?	Yes.