



NOTICE TO OFFERORS

April 4, 2024

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 Proposal (RFP) 4-2080 "Pacific Surfliner Marketing Services"

All Offerors:

This letter shall serve as **Addendum No. 2** to the above RFP issued by the Orange County Transportation Authority (Authority) on behalf of the Los Angeles-San Diego-San Luis Obispo Rail Corridor Agency (LOSSAN).

Offerors are hereby notified that the submittal date for proposals has been extended to **2:00 p.m. on April 11, 2024.**

Additionally, a pre-proposal conference was held both on-site/in-person and via teleconference on March 26, 2024, at 2:00 p.m. The pre-proposal registration sheet is presented as Attachment A to this Addendum No. 2.

The following is a response to a written questions received on or before 2:00 p.m. on March 27, 2024, as stated in the RFP package.

Question 1: At the end of the teams meeting you mentioned the slides/presentation was shared, but I wasn't able to access it. Would you be able to share the presentation or link to the recorded meeting with me so that I can share with my team (would be greatly appreciated)?

Response 1: Please see Addendum No. 1.

Question 2: Does the stated budget include media expenditures and digital marketing management? What is the current media budget?

Response 2: Yes. This is the full budget and includes all advertising and sponsorship budgets. The vendor will serve as the Agency of Record and assist with securing partnerships and sponsorships. This is not a creative marketing position. Also, note that this is the maximum budget obligation, and the Agency may not utilize the entire amount.

Question 3: We assume digital advertising management is part of this scope?

Response 3: No, it is not. Google, Meta, TikTok, and YouTube advertising is managed separately.

Question 4: What media channels have been successful for Pacific Surfliner?

- Response 4: Digital channels perform very well for the Pacific Surfliner. But as mentioned in the response to Question No. 3, that is not a part of this scope.**
- Question 5: Are festival/parade/sports sponsorships or event promotion expenses included in the budget?
- Response 5: Yes. This is the full budget for any and all activities under the contract.**
- Question 6: We assume Pacific Surfliner has partnerships with Travel organizations throughout California – do you also have hotel and amenity partnerships and cross-promotional relationships?
- Response 6: We do not. Note that we must make sure that partnerships with private businesses follow legal requirements for public agencies.**
- Question 7: Does Pacific Surfliner develop its own creative or use a combination of in-house and Amtrak National marketing creative and messaging?
- Response 7: In some instances, LOSSAN uses Amtrak National marketing creative, but LOSSAN mostly develops creative in-house. The vendor may need to support some creative development but that will be minimal.**
- Question 8: What is your ridership growth goal for 2024-2025 (percentage)?
- Response 8: The goal for 2024-2025 is to recover ridership to 2019 (pre-pandemic) numbers. That is 3 million riders per year.**
- Question 9: Has Pacific Surfliner conducted a rider survey or brand sentiment analysis in the past two years?
- Response 9: Yes.**
- Question 10: Do you have any recent market research that you can share?
- Response 10: Yes. LOSSAN will share this with the selected firm.**
- Question 11: Are we allowed to add additional labor categories on our pricing proposal?
- Response 11: You may utilize Exhibit B, “Other Labor Charges,” for this purpose.**
- Question 12: Is the budget inclusive of paid media?
- Response 12: Yes. It will also include any sponsorship costs.**

Question	13:	Who is the incumbent?
Response	13:	MonarCX.
Question	14:	If there is an incumbent, what were the historical annual hours spent on this contract by key personnel?
Response	14:	LOSSAN has not done as much field marketing as we would have liked since before the pandemic. This number is therefore not relevant.
Question	15:	What is the budget?
Response	15:	\$550,000.00.
Question	16:	Is the proposed budget inclusive of the media spend?
Response	16:	Refer to Question No. 2.
Question	17:	Understanding the annual budget is \$550,000.00, how much of that was spent on media buying last year?
Response	17:	Approximately a quarter of the budget.
Question	18:	Is there a DBE goal for this contract? If so, can the prime fulfill the DBE goal?
Response	18:	No, there is no Disadvantaged Business Enterprise (DBE) goal.
Question	19:	Does the agency have existing creative assets (photographs, videos, designs) to use in advertisements or is it the contractor's responsibility to create those?
Response	19:	Yes, LOSSAN has existing creative assets. However, the selected vendor will be responsible for negotiating with new partners they collaborate with to produce or provide necessary assets, such as videos for events like the Strawberry Festival or Sparks. The vendor will be responsible for negotiating sponsorship/partnership packages, which will often include the partner creating the needed assets (e.g. a video of their mascot riding the train).
Question	20:	Is there an existing communications strategy or will a new one be expected to be developed?
Response	20:	A communications strategy is in place. The vendor should be proficient in field marketing and will provide suggestions to improve the strategy within their areas of responsibility.

- Question 21: What are some examples of emerging technologies that LOSSAN has implemented in recent years?
- Response 21: A recent example is that LOSSAN has recently procured a User Generated Content (UGC) sourcing service, which will make it easier for LOSSAN's social media vendors to source and request permissions for UGC content.**
- Question 22: How many in-person events do you expect the contractor to staff during a one-year period?
- Response 22: Three to eight.**
- Question 23: Should ODCs include printing of materials?
- Response 23: LOSSAN has printing services available for standard sized items such as flyers, rack cards, brochures, and stickers. Non-standard items would be included in the budget.**
- Question 24: The RFP mentions that the winning agency will work in collaboration with LOSSAN's in-house marketing team. Can you provide some background on the structure and size of this team and which activities this team currently handles?
- Response 24: The in-house team is a small three-person team that oversees all aspects of the marketing program. The winning vendor will work closely with the team.**
- Question 25: For example, will the internal team continue to manage Pacific Surfliner's official social media handles? Is there an internal paid media team, or should we include full-service paid media management as part of the proposal?
- Response 25: Social media is not a part of this contract. A different vendor supports social media marketing.**
- Question 26: Can you describe your existing data infrastructure for marketing performance reporting and optimization?
- Response 26: LOSSAN's current data infrastructure for marketing performance is comprised of a data collection system that gathers data from various sources. These include: website analytics, social media platform, ticketing data, and email marketing tools among others. A combination of tools are used to collate and analyze the data and track Key Performance Indicators such as engagement, ridership, and Return on Investment.**
- Question 27: Is there any existing consumer research or audience segmentation available?

- Response 27: Yes, and will be shared with the selected vendor.**
- Question 28: Does LOSSAN manage a CRM database, and has any segmentation been developed on these customer records?
- Response 28: LOSSAN does not have a Customer Relationship Management database.**
- Question 29: Are there any existing marketing partnerships in place? Travel, hospitality, university, local chambers of commerce, sports teams / leagues, influencers, etc.?
- Response 29: Yes, a number of partnerships are in place with convention and visitor's bureaus, sports teams, influencers and many others. They will be shared with the selected vendor.**
- Question 30: Can we get a sense of your annual marketing and/or paid media budgets?
- Response 30: The overall annual marketing budget is \$1.6 million.**
- Question 31: What are the percentages of riders for leisure vs. commuters?
- Response 31: Approximately 75% of riders are leisure travelers. Under 20% are commuters.**
- Question 32: When you mention "field marketing," can you provide a bit more details regarding this? And what does it mean to the Surfliner team?
- Response 32: This is the team that helps LOSSAN maintain and establish relationships with partners across the corridor. This includes convention and visitor's bureaus, sports teams, event venues and others. This is also the team that will engage with potential customers across the corridor by attending in person events.**
- Question 33: Based on yesterday's briefing, events appear to be a high priority for this relationship. Are you looking for an agency focused on managing field activations, or are you looking for an agency that can drive ridership with creative, media, partnerships, and field activations?
- Response 33: Field activations will be an important part of the contract but the selected firm will be expected to help drive ridership through their efforts.**
- Question 34: Can you provide the breakdown of current ridership, occasion, demographic, psychographic, etc.? I know it was discussed partially yesterday, but it would be great to get it in writing to ensure we heard correctly.

- Response 34:** 75% of riders are leisure riders.
6% are commuters and 7% are traveling for business.
16% are students.
Over 60% of all riders are between the ages of 18 to 45.
- Additional details will be shared with the selected vendor.**
- Question 35:** Is there a target goal for increased riders with this initiative?
- Response 35:** The goal is to return to pre-pandemic ridership numbers.
- Question 36:** Can you provide more detail about the request for 8.5 x 11 for the deliverable format? Is this specific to the printout, and can we leverage a PowerPoint presentation as long as the output is an 8.5x11 document?
- Response 36:** Proposals should be submitted on 8 1/2" x 11" size paper. You may include a link in your proposal for any sample content/presentation.
- Question 37:** Can you reconfirm the type of electronic deliverable that is needed? What is accessible?
- Response 37:** Offerors shall also include one (1) electronic copy of their entire RFP submittal package in "PDF" format, on a CD, DVD, or flash drive.
- Question 38:** For the delivery, does it have to be received by 2 p.m. on 4/9 or postmarked by that date and time?
- Response 38:** Submittal date for proposals has been extended and proposals must be received in the Authority's office at or before 2:00 p.m. on April 11, 2024.
- Question 39:** Would the team consider an agency that has experience with regional tourism (The Original Farmers Market in LA), entertainment (LA Phil), and transportation (via automotive) expertise (Honda and Lexus) as the agency, or are you *really* looking for transportation?
- Response 39:** For this role, vendors should possess experience in either tourism or transportation, as both are equally valuable for the role. Experience with both is highly valued.
- Question 40:** Are there any potential extensions to the delivery deadline, even being a week (i.e. April 16)?
- Response 40:** The submittal date for proposals has been extended to 2:00 p.m. on April 11, 2024.

Question 41: We missed the preproposal meeting. Will you be uploading the meeting recording and / or who attended?

Response 41: The Pre-Proposal presentation was presented as Attachment B in Addendum No. 1. The pre-proposal registration sheets are presented as Attachment A to this Addendum No. 2.

Question 42: One question we have is in regard to the advertising and production elements of our proposal.

For example: If we are to recommend a media buy, should we plan to include the photography and media cost to come out of the total budget amount of \$550k? We assume the answer is yes... and that all production elements - print, promotional, etc. should be included in the total cost. Is this correct?

Response 42: Photography and promotional printing can be excluded from the budget in most circumstances. LOSSAN has a contracted photography firm available to assist with asset creation, and LOSSAN can handle the printing of most standard promotional materials in-house. Please ensure that the proposal includes the media buy, as well as sponsorship costs within the budget.

Question 43: I was wondering if we could request an electronic submission in light of the lifting of all delivery guarantees from all the courier companies and if we could request for an extension to the proposal submission deadline, please?

Response 43: Proposals must be received in the Authority's office at or before 2:00 p.m. on April 11, 2024.

Proposals received after the above-specified date and time will be returned to Offerors unopened.

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 gtorres@octa.net.

Sincerely,



Gina Torres

Contract Administrator

Contracts Administration and Materials Management



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: 4-2080

Date: March 26, 2024

Title: Pacific Surfliner Marketing Services

1. Company Name: VISTORA MEDIA
Attendee: Ulysses Alvarez
Address: 514 MAIN ST #537
City, State Zip: EL SEGUNDO CA 90245
Phone Number: (213) 500-4556 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☒ DBE ☒
E-Mail Address: ULYSSES@VISTORAMEDIA.COM

2. Company Name: _____
Attendee: _____
Address: _____
City, State Zip: _____
Phone Number: () _____ Registered on CAMM NET? ☐ Yes ☐ No
Prime ☐ Sub ☐ DBE ☐
E-Mail Address: _____

3. Company Name: _____
Attendee: _____
Address: _____
City, State Zip: _____
Phone Number: () _____ Registered on CAMM NET? ☐ Yes ☐ No
Prime ☐ Sub ☐ DBE ☐
E-Mail Address: _____



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: 4-2080

Date: March 26, 2024

Title: Pacific Surfliner Marketing Services

1. Company Name: Blue C
Attendee: Kristin Bush
Address: 151 Kalmus Dr Ste A-102
City, State Zip: Costa Mesa CA 92626
Phone Number: 714 7179939 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐ DBE ☐
E-Mail Address: kbush@bluecusa.com

2. Company Name: _____
Attendee: _____
Address: _____
City, State Zip: _____
Phone Number: () _____ Registered on CAMM NET? ☐ Yes ☐ No
Prime ☐ Sub ☐ DBE ☐
E-Mail Address: _____

3. Company Name: _____
Attendee: _____
Address: _____
City, State Zip: _____
Phone Number: () _____ Registered on CAMM NET? ☐ Yes ☐ No
Prime ☐ Sub ☐ DBE ☐
E-Mail Address: _____



ADDENDUM NO. 1 TO RFP 4-2080
ATTACHMENT A

PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: 4-2080

Date: March 26, 2024

Title: Pacific Sunliner Marketing Services

1. Company Name: A Bright Idea

Attendee: Kristine Robinson

Address: 210 Alhambra St

City, State Zip: Bell Air MD 21014

Phone Number: 410, 836-7780

Registered on CAMM NET? ☒ Yes ☐ No

Prime ☒ Sub ☒ DBE ☒

E-Mail Address: kristine@abrightideaonline.com

2. Company Name: _____

Attendee: _____

Address: _____



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: 4-2080

Date: March 26, 2024

Title: Pacific Surfliner Marketing Services

-
1. Company Name: Accio Ads LLC
- Attendee: Ashley Vasquez and Eric Vasquez
- Address: 4864 W 134th St
- City, State Zip: Hawthorne, CA 90250
- Phone Number: (424) 369-8183 Registered on CAMM NET? ☒ Yes ☐ No
- Prime ☒ Sub ☐ DBE ☒
- E-Mail Address: eric.vasquez@accioads.com or ashley.vasquez@accioads.com
-
2. Company Name: _____
- Attendee: _____
- Address: _____
- City, State Zip: _____
- Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
- Prime ☐ Sub ☐ DBE ☐
- E-Mail Address: _____
-
3. Company Name: _____
- Attendee: _____
- Address: _____
- City, State Zip: _____
- Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
- Prime ☐ Sub ☐ DBE ☐
- E-Mail Address: _____



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: 4-2080

Date: March 26, 2024

Title: Pacific Surfliner Marketing Services

1. Company Name: D2 Creative LLC
Attendee: Charles Leinas
Address: 720 Market Street
City, State Zip: Kirkland, WA 98033 - other locations in Portland OR, San Diego CA, Boston MA
Phone Number: (425) 605-9538 Registered on CAMM NET? ☒ Yes ☐ No
Prime ☒ Sub ☐ DBE ☐
E-Mail Address: charles@thinkd2.com

2. Company Name: _____
Attendee: _____
Address: _____
City, State Zip: _____
Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
Prime ☐ Sub ☐ DBE ☐
E-Mail Address: _____

3. Company Name: _____
Attendee: _____
Address: _____
City, State Zip: _____
Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
Prime ☐ Sub ☐ DBE ☐
E-Mail Address: _____



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: 4-2080

Date: March 26, 2024

Title: Pacific Surfliner Marketing Services

-
1. Company Name: Oak Leaf Productions
- Attendee: Daniel Marin
- Address: 300 Pacific Coast Hwy #330
- City, State Zip: Huntington Beach, CA 92648
- Phone Number: (949) 694-4302 Registered on CAMM NET? ☒ Yes ☐ No
- Prime ☒ Sub ☐ DBE ☐
- E-Mail Address: dmarin@oakleafproductions.com
-
2. Company Name: Oak Leaf Productions
- Attendee: Mia Esparza
- Address: 300 Pacific Coast Hwy #330
- City, State Zip: Huntington Beach, CA 92648
- Phone Number: (714) 794-6572 Registered on CAMM NET? ☐ Yes ☐ No
- Prime ☒ Sub ☐ DBE ☐
- E-Mail Address: mesparza@unitedcollective.com
-
3. Company Name: _____
- Attendee: _____
- Address: _____
- City, State Zip: _____
- Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
- Prime ☐ Sub ☐ DBE ☐
- E-Mail Address: _____



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: 4-2080

Date: March 26, 2024

Title: Pacific Surfliner Marketing Services

-
1. Company Name: Quantum Kinnect
- Attendee: Raymond Nunes
- Address: PO Box 74712
- City, State Zip: San Clemente, CA 92673
- Phone Number: (949) 378-5177 Registered on CAMM NET? ☒ Yes ☐ No
- Prime ☒ Sub ☐ DBE ☐
- E-Mail Address: Ray@QuantumKinnect.com
-
2. Company Name: _____
- Attendee: _____
- Address: _____
- City, State Zip: _____
- Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
- Prime ☐ Sub ☐ DBE ☐
- E-Mail Address: _____
-
3. Company Name: _____
- Attendee: _____
- Address: _____
- City, State Zip: _____
- Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
- Prime ☐ Sub ☐ DBE ☐
- E-Mail Address: _____



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: 4-2080

Date: March 26, 2024

Title: Pacific Surfliner Marketing Services

-
1. Company Name: Rocket Launch Marketing & PR
- Attendee: Erin Gibbons
- Address: 190 S Glassell St. Suite 201
- City, State Zip: Orange, CA 92866
- Phone Number: (714) 694-7193 Registered on CAMM NET? ☒ Yes ☐ No
- Prime ☒ Sub ☐ DBE ☐
- E-Mail Address: egibbons@rocketlaunchagency.com
-
2. Company Name: _____
- Attendee: _____
- Address: _____
- City, State Zip: _____
- Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
- Prime ☐ Sub ☐ DBE ☐
- E-Mail Address: _____
-
3. Company Name: _____
- Attendee: _____
- Address: _____
- City, State Zip: _____
- Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
- Prime ☐ Sub ☐ DBE ☐
- E-Mail Address: _____



PRE-PROPOSAL CONFERENCE REGISTRATION

RFP/IFB #: 4-2080

Date: March 26, 2024

Title: Pacific Surfliner Marketing Services

-
1. Company Name: TRAFFIK
- Attendee: Brent Shoji
- Address: 874 Spectrum Center Drive
- City, State Zip: Irvine, CA 92618
- Phone Number: (949) 679.6820 Registered on CAMM NET? ☒ Yes ☐ No
- Prime ☒ Sub ☐ DBE ☐
- E-Mail Address: rfp@traffikonline.com
-
2. Company Name: TRAFFIK
- Attendee: Elijah Trimino
- Address: 874 Spectrum Center Drive
- City, State Zip: Irvine, CA 92618
- Phone Number: (949) 679.6820 Registered on CAMM NET? ☒ Yes ☐ No
- Prime ☒ Sub ☐ DBE ☐
- E-Mail Address: rfp@traffikonline.com
-
3. Company Name: _____
- Attendee: _____
- Address: _____
- City, State Zip: _____
- Phone Number: () Registered on CAMM NET? ☐ Yes ☐ No
- Prime ☐ Sub ☐ DBE ☐
- E-Mail Address: _____