



May 19, 2016

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 Information (RFI) 6-1202
“Social Media Management System”**

Gentlemen/Ladies:

The Orange County Transportation Authority (OCTA) intends to release a Request for Proposals (RFP) for a firm to provide a social media management system. OCTA is offering an opportunity for firms to review the attached draft Scope of Work and provide information regarding currently available products or customized solutions in order to meet OCTA's objectives. Please find the attached draft Scope of Work for information requested.

Please be advised that OCTA may schedule demonstrations with the firms that submit responses.

Participation in this process is optional and no contracts will be awarded under this RFI. Please be advised that OCTA reserves the right to accept and reject any comments to the Scope of Work. If you have any questions regarding this RFI, please contact the undersigned via email at idenEAU@octa.net.

Please submit all RFI firm responses via email before or by **4:00 p.m., June 2, 2016.**

Sincerely,

Iris Deneau
Contract Administrator
Contracts Administration and Materials Management

DRAFT SCOPE OF WORK

Social Media Management System

INTRODUCTION

The Orange County Transportation Authority (OCTA) wishes to conduct a Request for Information (RFI) to gather information about web-based social media management services to help achieve transportation communications goals via OCTA social media channels, including:

- Facebook
- Twitter
- Instagram
- YouTube
- LinkedIn
- Flickr
- Yelp

OCTA staff, including two social media coordinators, wishes to use a social media management system to achieve marketing and communications goals and objectives.

BACKGROUND

OCTA works with federal, state, regional, and local officials, community groups, businesses, and other transportation agencies to provide the public with transportation solutions. As the county transportation agency responsible for planning, funding, and delivering transportation improvements, OCTA focuses on providing solutions that enhance mobility and improve the quality of life for the residents of Orange County.

OCTA creates and implements innovative marketing and communications programs that help educate the public on transportation issues that affects their lives. One of the key activities for the OCTA Marketing Department is creating and publishing transportation information through various social media channels.

Services and Programs for Social Media Marketing

OCTA's social media channels provide the residents of Orange County with information, promotions, surveys, and customer relations opportunities related to:

- OCTA news
- Bus operations
- Metrolink trains
- Measure M
- Improvements on freeways, streets and roads, and transit
- Environmental programs
- 91 Express Lanes
- Rideshare programs, such as vanpool and carpool
- Financial information
- Corporate and Board of Directors communications
- Collaborative support of other regional transit agencies, such as the Los Angeles – San Diego – San Luis Obispo Rail Corridor Agency (LOSSAN)

OCTA's Facebook pages serve more than 37,000 fans with customer relations, public communications, marketing, promotions, and advertising. On Twitter, OCTA serves more than 12,000 followers with transportation news, updates, alerts, and promotions. These social media channels, as well as others, serve as a major resource for the organization, as well as transit customers and the public in Orange County.

Audiences

- General public
- Customers and prospective customers
- County and city officials
- Local businesses
- OCTA employees
- OCTA Board of Directors

SITUATION ANALYSIS

Social media marketing and communications have matured to become essential for enhancing public awareness, perception, and usage of transportation projects and services. Social channels have continued to grow both in terms of the amount of content that needs to be created / published and the increased size of the audiences across various channels. Asset, content, and community management have become difficult using manual approaches given the size of the programs.

A social media management service or platform would allow OCTA staff to efficiently and effectively help drive success with ongoing tactics and reporting on campaign performance with the goal of delivering success on key metrics and driving continuous improvement and innovation.

Firm may provide feedback on the ways to support standard social tactics and reporting.

FIRM'S RESPONSE:

FUNDAMENTAL SERVICES

OCTA wishes to request information on capabilities of available social media management systems.

Users: The platform or services should allow a minimum of five (5) unique users unlimited access to an unlimited number of social media accounts.

Firm may provide feedback on the number of users and management of unlimited number of social media accounts.

FIRM'S RESPONSE:

Platform: To increase organizational efficiencies, the system should serve as a unified platform.

Firm may provide feedback on the structure of the platform or service(s), including how options can address the following requested functions.

FIRM'S RESPONSE:

Planning. The system should provide planning and management of social media content, including scheduling and asset management.

Firm may provide feedback on this function.

FIRM'S RESPONSE:

Publishing. The platform should support publishing content (text, images, and video) across various channels, scheduling posts, categorizing posts by campaign, and tagging posts. OCTA also wishes to use web link shortening.

Firm may provide feedback on this function.

FIRM'S RESPONSE:

Reporting. The platform should support unified reporting across all social media channels and accounts along with campaign-level metrics using pre-built and customizable dashboards. Optionally, OCTA is also interested in using geographic metrics that can be drilled down to Orange County and Orange County city-level.

Firm may provide feedback on this function.

FIRM'S RESPONSE:

Paid Media. The platform should support the advertising and promotion of organic and/or paid content with paid ads, including targeted paid ads and reporting.

Firm may provide feedback on this function.

FIRM'S RESPONSE:

Monitoring. The platform should support social media monitoring across all OCTA social media channels (see INTRODUCTION above). Optionally, monitoring non-English and other channels is encouraged.

Firm may provide feedback on this function.

FIRM'S RESPONSE:

Collaboration. The platform must facilitate the management of content, including governance, approvals, and scheduling posts. Optionally, the system should monitor using automated business rules to route content to the appropriate social media coordinator.

Firm may provide feedback on this function.

FIRM'S RESPONSE:

Customer Service. OCTA is interested in improving efficiencies by providing tools for social media responses, moderation, and customer service.

Firm may provide feedback on this function.

FIRM'S RESPONSE:

Dashboard. OCTA is interested in standard and customizable dashboards that analyze and report on data from all of OCTA's social media channels to discover insights, topics, audiences, and conversations. Optionally, the system could provide sentiment analysis and tag clouds for social channels.

Firm may provide feedback on this function.

FIRM'S RESPONSE:

Multiple Language Support: Optionally, OCTA is interested in capabilities for planning, publishing, and reporting for non-English social media channels to reach various target demographics in their native language.

Firm may provide feedback on this function.

FIRM'S RESPONSE:

Cost Estimate: OCTA is interested in the estimated costs for a social media management platform based on the information provided above.

Firm may provide feedback on the estimated costs.

FIRM'S RESPONSE:

Other Capabilities: OCTA is interested in learning of other capabilities that should be considered for a social media management platform. Respondents are encouraged to provide readily available product material on services, platforms, or additional capabilities. Program or platform demonstrations will be acceptable only if requested by OCTA.