

**REQUEST FOR QUALIFICATIONS (RFQ)  
TO PROVIDE MARKETING SERVICES TO THE SAN FRANCISCO BAY AREA  
WATER EMERGENCY TRANSPORTATION AUTHORITY**

The San Francisco Bay Area Water Emergency Transportation Authority (WETA) is seeking Statements of Qualifications (SOQ) from qualified consultant firms or teams of firms to develop a multi-year Marketing Plan (Plan) to assist WETA in implementing a creative and comprehensive system identity or branding strategy and to guide WETA's investments in marketing resources.

**A. BACKGROUND**

In 1999, the state legislature created the Bay Area Water Transit Authority (WTA) to plan for regional growth of ferry services. In 2008 the Legislature voted to establish a successor agency, the San Francisco Bay Area Water Emergency Transportation Authority in response to a need for more comprehensive water transportation and emergency services, a regionalized approach that will significantly increase the Bay Area's emergency response capabilities and contribute significantly to a more robust and environmentally friendly ferry system. WETA's expanded responsibilities include coordination of waterborne emergency response activities across the region, consolidating Alameda-Oakland, Alameda Harbor Bay and Vallejo Baylink services under WETA and planning and implementing new ferry routes. These expanded responsibilities are to be conducted consistent with the provisions of an *Emergency Water Transportation System Management Plan* (Emergency Plan) and a *Transition Plan*, which were both adopted by WETA in June, 2009.

The *Emergency Plan* was prepared in cooperation with state emergency officials and the U.S. Coast Guard and lays out how WETA will prepare for, respond to, and recover from disasters impacting public health, welfare and transportation across the Bay area. The *Transition Plan* was prepared in partnership with city owned ferry services and MTC and sets forth a five year plan for consolidating city owned ferry services under WETA, planned new service expansions, including South San Francisco and Berkeley, and ongoing future ferry service expansion activities. WETA expects that required lease agreements and asset transfers will be in place to complete the transition of Alameda-Oakland and Alameda Harbor Bay ferry services to WETA in January, 2010 and to complete the transition of Vallejo Baylink ferry service by July, 2010. These plans are available at [www.watertransit.org](http://www.watertransit.org).

In May, 2005, WTA completed a multiyear *Marketing Plan* focused on building new ferry ridership for a new network of ferry service that was expected to unfold over time. It was expected that each new ferry service would eventually have its own marketing plan to guide, launch and sustain marketing over time. Accordingly, in July 2007 WTA prepared a *Marketing Plan for South San Francisco/Oakland Ferry Service* using the 2005 *Marketing Plan* as a framework. South San Francisco Ferry Service is expected to begin in late spring 2011. WETA expects to implement recommended marketing activities to guide future activities and budgeting for launching ferry service in South San Francisco. Both marketing plans are available at [www.watertransit.org](http://www.watertransit.org).

Additional marketing efforts undertaken in partnership with the City of Alameda includes development of an *Alameda Harbor Bay Ferry Marketing Action Plan* in 2005 which outlined expanded public relations and community outreach activities for the Alameda Harbor Bay Ferry. Useful information on the Vallejo Baylink ridership is included in the *Ridership Study, Baylink Ferry and Line 200* completed in March, 2007 for the Solano County Transportation Authority. These documents are available at [www.watertransit.org](http://www.watertransit.org).

## **B. REQUIRED CONSULTANT SERVICES**

With this RFQ, WETA intends to select a team qualified to develop a comprehensive multi-year Marketing Plan aimed at building a system identity for WETA's comprehensive brand of services. WETA anticipates having an approved Marketing Plan in place by January, 2010 and that the cost for Marketing Plan consultant services will fall within the range of previous marketing efforts, which totaled approximately \$70,000.

The Plan should include activities to increase public awareness of the emergency response, transit, and customer-focused benefits of consolidated regional ferry services, and to retain and build upon the unique offerings of existing ferry services to maintain and build ferry ridership. Specific tasks will include:

### **1. Review existing materials and identify additional marketing data needs.**

- a. Review existing WETA informational materials including the *Emergency Water Transportation System Management Plan*, *Transition Plan*, quarterly newsletters, Vallejo Baylink and Alameda website content and other informational materials to gain an understanding of WETA and local ferry service existing system identity concepts and WETA's expanded roles and responsibilities.
- b. Analyze existing WETA, Vallejo Baylink, and Alameda/ Oakland and Alameda Harbor Bay Marketing Plans to gain an understanding of the regional ferry market.
- c. Identify gaps and steps to provide additional marketing information required.

### **2. Develop marketing messages and a plan for delivering that message.**

### **3. Develop a detailed execution plan for branding an identity encompassing WETA's ferry services. Include strategies, tactics, and budgets.**

**4. Recommend updates to WETA's informational materials to support the marketing messages and branding strategy.** These materials will include recommended updates to WETA's informational brochures, quarterly newsletters, and website and a phased integration with Alameda and Vallejo websites. The consultant will not be responsible for producing these informational documents or updating the websites, but should have the capability to create consistent, high quality text and graphic themes as part of the branding strategy to illustrate the recommendations.

### **5. Recommend and develop outreach programs, promotional events, and other activities that advance WETA's expanded roles and responsibilities.**

## **C. CONSULTANT CONTRACT ADMINISTRATION**

All consultant work will be authorized on a task order basis. In general, the first order of work will be a scoping task, which will identify the critical steps necessary and how the work will be coordinated. Budgets for each Task Order shall be negotiated based on rates and overheads identified in the Master Agreement.

## **D. STATEMENT OF QUALIFICATIONS (SOQ) CONTENT**

The SOQ should not exceed 15 total pages in length. The cover letter and any forms are not included in the 15 page limit. Additional material may be included in appendices to the SOQ but

should be limited so that the total number of pages does not exceed 30. Elaborate brochures or other presentation material not related to this scope of work are not desired. The submittal content and format should demonstrate the cost consciousness of the team. The submittal should be organized in the following sequence:

**Cover Letter (2 pages)** - Summarize the make up of the team, key approaches and any other pertinent information that describes the firm or team's interest in and commitment to the project. Include the name, email address and telephone number of a contact person.

**Project Understanding** - Demonstrate the consultant understanding of the nature of the work and the general approach to be taken.

**Proposed Approach** - Provide a general explanation of the approach you would take for completing the work, addressing the tasks outlined in Section B above and discussing the deliverables for each phase. Identify any potential hurdles to the delivery of the project. *The proposed approach is usually the primary source to differentiate consultant teams.*

**Project Schedule** - Develop a project schedule with key milestones, decision points, and deliverable dates.

**Proposed Team Composition** - Identify the prime firm and each subconsultant proposed for the team, and provide brief statements of each firm(s) relevant experience and role on the team. Include an organization chart.

**Proposed Staffing Plan** - Designate the Principal and Project Manager in charge of the project from the prime contracting firm. These individuals are expected to serve as the WETA contact throughout the duration of the contract. The SOQ should describe the individuals and their roles on the team. In addition, for each firm or subconsultant, the SOQ should identify key staff members and include a resume (maximum 2 pages each as appendices, which does not count towards the 15 page limit) describing similar projects on which they have been involved, availability of the staff member over the duration of the project, and a description of the benefits the person brings to the team. Indicate recent, relevant experience and references on similar projects where a similar role was performed. Full resumes may be included in the appendix. Any substitution of key staff during the project will require approval from the WETA.

**Previous Experience** - Include descriptions of relevant projects previously performed by the staff proposed. The descriptions should include what services were performed, the date of the project, unique features of the project which would be beneficial to the WETA, and a client reference.

**References** - Include at least three references for work your firm has done of a similar nature that WETA staff may contact in our review of your submittals.

**Levine Act Disclosure** - Provide required Levine Act Information. (See information below concerning the Levine Act.)

**Fees** - Required consultant services fees will be negotiated after the selection of the most qualified consultant. Consultant's fee proposal should include fees by person, a breakdown of your rates as to direct and indirect charges and the fee structure of all subconsultants. The fee proposal should be sent by "hard copy" paper **only** in a separate sealed envelop labeled **Marketing Services, Fee Proposal - WETA RFQ 08/09**.

#### **E. SUBMITTAL PROCEDURES, SELECTION CRITERIA AND SCHEDULE**

WETA will hold a non-mandatory pre-proposal conference to review this RFQ at WETA offices, Pier 9, The Embarcadero, Suite 111, and San Francisco, CA. Explanations or clarifications desired by respondents regarding the meaning or interpretation of this RFQ may be requested at this conference or in written form by contacting Shirley Douglas, WETA Community Relations Manager at 415-364-3191 or emailing at [douglas@watertransit.org](mailto:douglas@watertransit.org). All such requests must be received by 5:00PM on Monday, August 24.

WETA specifically requests that any questions concerning this RFQ be made to Shirley Douglas. Please do not contact other WETA staff.

Responses should be submitted in a sealed envelop marked:

**WETA Marketing Services - WETA RFQ 08/09**  
to:

Shirley Douglas  
Manager, Community Relations  
Water Emergency Transportation Authority  
Pier 9, Suite 111  
San Francisco, CA 94111

Six copies of your submittals must be received at the above address no later than 2:00PM Local Time Tuesday, September 1, 2009. SOQs should be submitted both as hard copies and in electronic format via e-mail and on CD-ROM. Please submit your Fee Proposal (one copy) in a separate sealed envelope labeled accordingly. **Do not send your fee proposal via email or CD-ROM.**

SOQs will be reviewed based on, but not limited to, the following criteria:

- ☐ Adherence to instructions contained in this RFQ
- ☐ Qualifications of the Project Manager and other key staff
- ☐ Project understanding as demonstrated in the proposed project approach and as expressed in oral interviews
- ☐ Previous experience developing innovative, creative and cost-effective marketing strategies for water transit, transportation and or other similar projects
- ☐ Qualifications of team members including working with a multi-disciplinary team of firms engaged in marketing activities, preparation of collateral materials, and website design for water transit and/or other transportation systems.
- ☐ Satisfaction of previous clients including the ability to complete work in a timely manner and within budget.

Final staff recommendations to the Board as to the proposed successful respondent to this solicitation will be based on rankings established by the evaluation committee.

The following schedule is targeted for consultant selection:

|                          |                                                                                                              |
|--------------------------|--------------------------------------------------------------------------------------------------------------|
| RFQ Release Date:        | August 7, 2009                                                                                               |
| Pre-proposal conference: | 10:00 a.m. Friday, August 14, 2009 at the WETA Offices, Pier 9, The Embarcadero, Suite 111, San Francisco CA |
| Submittals Due:          | 2:00 p.m. Local Time, Tuesday, September 1, 2009 @ WETA Offices                                              |
| Interviews (as needed)   | Friday, September 11, 2009                                                                                   |
| Board selection:         | Thursday, October 1, 2009                                                                                    |

***The Authority reserves the right to reject any and all SOQs and to waive any informality in procedures.***

#### **F. LEVINE ACT**

The Levine Act (Government Code 84308) is part of the Fair Political Practices Act that applies to elected officials who serve on appointed Boards such as the San Francisco Bay Area Water Emergency Transportation Authority. The Levine Act prohibits any WETA Board Member who has received \$250.00 or more within the previous twelve months from an applicant from participating in or influencing the decision on awarding a contract with the Authority. The Levine Act also requires a member of the WETA Board who has received such a contribution to disclose the contribution on the record of the proceeding. In addition, WETA Board Members are prohibited from soliciting or accepting a contribution from a party applying for a contract while the matter of awarding the contract is pending before WETA or for three months following the date a final decision concerning the contract has been made.

Applicants must disclose on the record any contribution of \$250.00 or more that they have made to a WETA Board Member within the twelve-month period preceding submission of their application. This duty applies to your company, any member of your team, any agents for you or other team members and to the major shareholders of any closed corporation that is part of your team. If you have made a contribution that needs to be disclosed, you must provide written notice of the date, amount, and receipt of the contribution(s) in writing to WETA's Executive Director. **This information must accompany your SOQ.**