

Livermore Amador Valley  
TRANSIT AUTHORITY



February 16, 2024

To: All Interested Parties

From: Tamara Edwards  
Director of Finance  
Livermore Amador Valley Transit Authority

Re: **LAVTA RFP #2024-02 On-Call Creative, Design, and Media Strategy Services – Addendum Number 1**

This correspondence constitutes official record of the first alteration of a “Request for Proposals for **On-Call Creative, Design, and Media Strategy Services #2024-02**” issued by LAVTA on January 31, 2024.

This Addendum amends the documents referenced above as follows:

Amend **Section 1 – Invitation, Solicitation Timeline** to change the date of the optional Pre-Proposal Conference to **February 15, 2024**

Replace Exhibit 7, “Cost Proposal Form” with the attached **Revised Exhibit 7, “Cost Proposal Form.”**

Replace **APPENDIX A – SCOPE OF WORK** with the attached “**REVISED APPENDIX A – SCOPE OF WORK.**”

Other than those specifically listed above, no other sections, terms, or conditions of the above cited solicitation are being altered at this time. All other sections, conditions, and language not specifically cited as altered in this document are still in full and original effect.

Submitted:

*Tamara Edwards*

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Director of Finance

February 16, 2024

Date

**REVISED EXHIBIT 7: COST PROPOSAL FORM**

**Cost Proposal Form**

**Request for Proposal #2024-02**

The following proposal prices include all costs for labor, materials, taxes, insurance, overhead, profits, and all other costs necessary to perform the work in accordance with the solicitation documents.

**ON-CALL CREATIVE, DESIGN AND MEDIA STRATEGY SERVICES**

**CONSULTANT HOURLY RATES**

<b>Key Staff</b>			
<b>Name</b>	<b>Title</b>	<b>Area of Expertise</b>	<b>Rate per Hour</b>
1.			
2.			
3.			
<b>Other (include proposed subconsultants):</b>			

**Pricing for subsequent years:**

Pursuant to the Agreement, on an annual basis, the successful Proposer may request approval from LAVTA to increase its labor rates for the subsequent contract year.

SIGNED:

The undersigned certify that we sign this Cost Proposal Form with full and proper authorization to do so.

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Company Name

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Signature, Printed Name, and Title

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Signature, Printed Name, and Title

\*If a sole owner, it shall be signed by the owner of the company.

If a corporation, it shall be signed by a Corporate Officer who has full and proper authorization to bind the corporation to the proposal.

If a joint venture, it shall be signed on behalf of each participating company by officers or other individuals who have the full and proper authorization to bind each company to the proposal.

If a partnership, it shall be signed under the partnership name by a partner of the firm and the name of each partner shall be provided. If a limited liability company (LLC), it shall be signed by an officer or member who has the full and proper authorization to bind the LLC. The officer or member must provide evidence satisfactory to LAVTA indicating the individual's authority to bind the LLC, such as a certified copy of a resolution authorizing the individual to execute written contracts or a copy of the LLC operating agreement.

# REVISED APPENDIX A SCOPE OF SERVICES ON-CALL CREATIVE, DESIGN AND MEDIA STRATEGY

## 1. INTRODUCTION

### 1.1 Request for Proposals

The Livermore Amador Valley Transit Authority (LAVTA) seeks the services of a qualified firm to provide on-call creative, design and media strategy services in planning, managing, and implementing marketing campaigns for a wide variety of programs and initiatives.

### 1.2 Background

LAVTA operates Wheels bus services, providing fixed route, school tripper, rapid, and commuter express services. It also provides paratransit services through Dial-A-Ride and para-taxi to ADA eligible riders. Wheels service area is the cities of Dublin, Livermore, Pleasanton and adjacent unincorporated areas of Alameda County.

Funding for the system is provided by Federal, State and Alameda County sources. The seven-member LAVTA Board of Directors is responsible for the development of policy and oversight of LAVTA's services and programs.

### 1.3 Oversight

The Executive Director oversees the operation of the transit system in accordance with the policy direction prescribed by the Board of Directors and is responsible for the overall administration of the fixed route and paratransit system. At present, the Executive Director is supported by a staff of fifteen (15) employees. Two staff have dedicated marketing duties as defined by role. Consultants are retained as needed to provide specialized planning, marketing, and technical assistance.

## 2 Service Requirements

The applicable Scope of Services will be described in each Task Order, but the general Scope of Services includes, but is not limited to, the following:

### 2.1 Planning and Strategy Services

- Annual Planning: The contracted firm (Consultant) will plan annualized and ad-hoc campaigns supporting advertising, promotions, events, and education. The annual plan will be provided within 45 days of Notice to Proceed (NTP) and include proposed schedules, budgets, and reporting templates. This annual plan is a formalized document submitted to staff for review and to the Board of Directors for approval.

- Campaign (Media) Planning: The Consultant will prepare a project calendar and briefs that include campaign (media) strategy and tactics. The briefs must outline scheduling, budget and all media resources required.
- Promotion and Event Planning: The Consultant will prepare a project calendar and briefs that include promotion and event planning strategy and tactics. The briefs must outline scheduling, budget, and all promotional and event resources required.
- Auditing and Reporting: The Consultant will debrief and evaluate campaign and project outcomes to determine if initiatives successfully met objectives. Report deliverables will include comprehensive documentation defining outcomes against metrics set by objectives, budgets, execution against plans, samples of creative work and audits of medias placements.

## 2.2 Advertising and Media Services

The Consultant shall execute advertising campaigns and ad-hoc media buys to support LAVTA's marketing plans and objectives. The scope of work for this task includes but is not limited to:

- Media Recommendations: Consultant will analyze and recommend media channels and vendors which target optimal demographics with the highest return on investment based on project objectives.
- Media Buying: Consultant will participate in negotiations for the purchase of media on behalf of LAVTA. Consultant cannot receive a commission for the purchase of media by LAVTA.
- Scheduling and Insertions: Consultant will submit approved advertising orders on behalf of LAVTA in accordance with LAVTA's campaign planning.
- Creative Production: Consultant will produce all media including but not limited to art and copywriting for print, radio, television, out of home, and digital assets.
- Media Trafficking: Consultant will coordinate with media vendors on technical specifications and delivery of final art after LAVTA's approval.
- Auditing and Reporting: Consultant will produce spot run reports, tear sheets, and other proof of placement for all media orders.

## 2.3 Creative Services

### 2.3.1 Brand Services

- Brand and Style Guidelines: Consultant will update and adhere to LAVTA's brand and style guidelines.
- Media and Vendor Oversight: Consultant will ensure brand and messaging adherence on all media channels and produced goods.
- Brand Asset Library: Consultant will maintain a current media library of all brand assets.

### **2.3.2 Collateral Services**

- Collateral Library: Consultant will maintain a current media library of all collateral.
- Operational Updates: Consultant will update maps, schedules, and associated brochures and one sheet collateral for service changes.
- Promotional Support: Consultant will produce flyers, posters, and other promotional materials as required.
- Bus Cards: Consultant will produce compliance, stock, and promotional bus cards for bus interior advertising.

### **2.3.3 Graphics and Media Assets Services**

- Graphics and Media Library: Consultant will maintain a current library of all graphics and media.
- Creation and Revisions: Consultant will create and revise graphics and media assets for:
  - Wayfinding
  - Website Content
  - Social Media Content
  - Bus Graphics
  - Photography
  - Other designs, illustrations, and stock material as needed.
- Ordering and Trafficking: Consultant will manage collateral production vendors.
- Proofing: Consultant will perform quality checks of all collateral prior to production.

## **2.4 Website and Digital Services**

Note: Service does not include website hosting or server/platform maintenance.

- UI / UX: Consultant will recommend and implement User Interface (UI) and User Experience (UX) best practices for transit planning and site mapping.
- Content Management: Consultant will coordinate and provide support on platform Content Management Systems (CMS) administration including a staging (test) environment.
- Functionality: Consultant will perform improvements and additions of functionalities and modules, both permanent and temporary, on the CMS and other ancillary platforms and programs including administration and Application Programming Interface (API) connectivity.
- Content Administration: Consultant will coordinate and provide support for digital channels for campaigns and promotions.

### 3 Estimated Annual Service Hours

SOW Area	Annual Hours
Planning and Strategy Services / Account Administration	650
Advertising and Media	400
Creative Services	500
Website and Digital	500

### 4 General Services

#### 4.1 Creative Files

- Consultant shall produce artwork in high resolution electronic formats agreed to by LAVTA such as raw, mp4, Adobe Illustrator, or high-resolution jpeg for printing and video or other media applications. All work produced under the Agreement will become and remain the property of LAVTA. The Consultant must furnish electronic files containing the artwork directly to LAVTA staff or to LAVTA cloud-based file sharing websites.

#### 4.2 Reporting and Documentation:

- Consultant will provide and update a collaborative project management platform.
- Consultant will provide a monthly update of hours and costs by task order project.
- Consultant will coordinate bi-weekly status meetings or ad-hoc meetings as needed based on project requirements.
- Consultant will provide campaign and project debriefs for each initiative.
- Consultant will provide an end of year “look book” summarizing all campaigns and notable initiatives.

#### 4.3 Security and Compliance:

- Consultant will adhere to industry best practices and security standards in all IT support activities.
- Consultant will comply with all relevant regulations and requirements related to data privacy and information security.

#### 4.4 Basic Service, Office Hours, and Staffing

- Consultant will receive general guidance from LAVTA staff but will manage and control the day-to-day work directive activities and deliverables.
- Consultant must be able to provide services, as required, during normal business hours, which are 8:00 A.M.–5:00 P.M.
- Consultant must have sufficient staff available to maintain the required level of service when the Consultant's personnel are on vacation, out of state, or unavailable.

## **5 OPTION FOR ON-CALL MARKETING SURVEY AND RESEARCH SERVICES**

At LAVTA's option, LAVTA may seek the Consultant's assistance with passenger surveys, which may include, but is not limited to:

### **5.1 Annual Fixed Route Passenger Survey**

The Consultant will provide survey design, execution, analysis of and reporting on passenger satisfaction of fixed route services. The services may include:

- Project Management
- Outreach Strategy
- Survey and Infographic Design
- Online Survey Platform Development
- In-person Surveying
- Analysis and Summary of Findings

### **5.2 Annual Paratransit Passenger Survey**

The Consultant will provide survey design, execution, analysis of and reporting on passenger satisfaction of paratransit services. The services may include:

- Project Management
- Outreach Strategy
- Survey and Infographic Design
- Online Survey Platform Development
- Execution
- Analysis and Summary of Findings