

**Bay Area Toll Authority  
Oversight Committee**

**June 12, 2024**

**Agenda Item 2f-24-0663**

**FasTrak® Customer Education and Outreach Contract Actions:**

- i. Contract Amendment – Polytechnic Marketing LLC (Polytechnic) (\$2,600,000);**
  - ii. Contract Amendment – Kalamuna Inc. (Kalamuna) (\$250,000);**
  - iii. Contract Amendment – Caribou Public Relations, Inc. (Caribou) (\$350,000)**
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**Subject:**

A request to approve a contract amendment with Polytechnic to conduct FasTrak® marketing and customer education, a contract amendment with Kalamuna to provide website development and management services and a contract amendment with Caribou to provide FasTrak® event-based outreach services, subject to the approval of the FY 2024-25 Bay Area Toll Authority (BATA) budget.

**Background:**

BATA conducts marketing and customer education to get more drivers into FasTrak® and to help drivers understand how to pay their tolls. This involves advertising, material development and production, management of social media, customer education and other content on the FasTrak® website, and event-based marketing. Recent and current activities in Fiscal Year 2023-24 include continuing a campaign to promote the new payment plan, development of educational videos, promotion of tag exchanges to meet program and regulatory requirements, tabling at community events, and launch of a refreshed website.

**Contract Actions:**

Staff recommends that the BATA Oversight Committee authorize the Executive Director or his designated representative to enter into the following contract amendments to support further FasTrak® marketing, website and outreach activities:

**i. Marketing: Polytechnic Marketing LLC (\$2,600,000)**

Polytechnic has provided marketing services for the last three fiscal years. Their work has included developing a comprehensive campaign to promote the new regional payment plan and one-time BATA waiver, managing FasTrak®'s Facebook and Twitter pages, developing concepts for a FY 2024-2025 campaign to encourage customers to swap non-switchable toll tags to

switchable ones, updating the FasTrak® handbook, developing multilingual and accessible educational videos, and other tasks. Under the proposed contract amendment, Polytechnic will continue to conduct marketing and customer education in support of FasTrak®, including a campaign to educate drivers about the third Regional Measure 3 (RM3) bridge toll increase effective January 1, 2025, and a campaign to educate drivers about proposed changes in the High Occupancy Vehicle policies for the BATA toll bridges, as presented to the Committee in May 2023. Polytechnic will also finalize plans and manage the campaign to support the tag swaps described in item 4c. This contract is the result of a competitive procurement from the MTC 2020 Electronic Payments Bench and this Committee's approval of an award to Polytechnic on July 14, 2021. The amendment would add a not to exceed amount of \$2,600,000 and extend operations through June 30, 2025. Polytechnic is a small business enterprise. Attachment A includes a summary of the small business and disadvantaged business enterprise status of Polytechnic.

**ii. Website Development and Management: Kalamuna Inc. (\$250,000)**

Kalamuna has provided website development and management support for the FasTrak® website for the last three years. In Fiscal Year 2023-24, Kalamuna finalized design and production of an updated bayareafastrak.org website and continued research on development of a content management system and search function. Kalamuna was selected through a competitive procurement from the MTC 2020 Website Support Services Bench. On June 8, 2022, this Committee approved a contract amendment with Kalamuna to extend the work being performed through June 30, 2024. This requested amendment would add a not to exceed amount of \$250,000 and extend Kalamuna support through June 30, 2025, and will allow Kalamuna to make accessibility changes and implement a content management system for the Bay Area FasTrak® website. Kalamuna is a Small Business Enterprise but not a Disadvantaged Business Enterprise. Kalamuna's subcontractor, Convey, Inc, is both a Small Business Enterprise and a Disadvantaged Business Enterprise. Attachment B includes a summary of the small business and disadvantaged business enterprise status of Kalamuna and its subcontractor.

**iii. FasTrak® Event-Based Outreach: Caribou Public Relations, Inc. (\$350,000)**

Caribou services in Fiscal Year 2023-24 as of early May included outreach at 32 community outreach events. Caribou was selected through a competitive procurement from the MTC 2020 Electronic Payments Consultant Assistance Bench. On September 14, 2022, this Committee approved a contract with Caribou. This amendment would add a not to exceed amount of \$350,000 and extend Caribou support through June 30, 2025. This amendment will allow Caribou to conduct a greater number of ambassador outreach events to promote adoption of FasTrak® in Fiscal Year 2024-25. Caribou is a Disadvantaged Business Enterprise but not a Small Business Enterprise and has no subcontractors. Attachment C includes a summary of the small business and disadvantaged business enterprise status of Caribou.

**Issues:**

None identified.

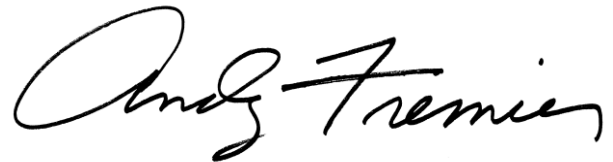
**Recommendations:**

- i. Staff recommends that this Committee authorize the Executive Director or designee to negotiate and enter into a contract amendment with Polytechnic Marketing LLC in an amount not to exceed \$2,600,000 to provide services as described herein, subject to the approval of the FY 2024-25 BATA budget.
- ii. Staff recommends that this Committee authorize the Executive Director or designee to negotiate and enter into a contract amendment with Kalamuna Inc. in an amount not to exceed \$250,000 to provide services as described herein, subject to the approval of the FY 2024-25 BATA budget.
- iii. Staff recommends that this Committee authorize the Executive Director or designee to negotiate and enter into a contract amendment with Caribou Public Relations, Inc. in an amount not to exceed \$350,000 to provide services as described herein, subject to the approval of the FY 2024-25 BATA budget.

**Attachments:**

- Attachment A – Polytechnic Marketing LLC Disadvantaged Business Enterprise and Small Business Enterprise Status
- Attachment B– Kalamuna Inc. Disadvantaged Business Enterprise and Small Business Enterprise Status

- Attachment C–Caribou Public Relations, Inc. Disadvantaged Business Enterprise and Small Business Enterprise Status
- Summary of Proposed Contract Amendment – Polytechnic Marketing LLC
- Summary of Proposed Contract Amendment – Kalamuna Inc.
- Summary of Proposed Contract Amendment – Caribou Public Relations, Inc.

A handwritten signature in black ink, reading "Andrew B. Fremier". The signature is written in a cursive, flowing style with a large initial 'A'.

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Andrew B. Fremier

Attachment A

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**Disadvantaged Business Enterprise and Small Business Enterprise Status**

Prime Contractor

| <b>Firm Name</b>              | <b>Role on Project</b>  | <b>DBE*<br/>Yes</b> | <b>If DBE Yes,<br/>List #</b> | <b>DBE<br/>No</b> | <b>SBE**<br/>Yes</b> | <b>If SBE Yes,<br/>List #</b> | <b>SBE<br/>No</b> |
|-------------------------------|-------------------------|---------------------|-------------------------------|-------------------|----------------------|-------------------------------|-------------------|
| Polytechnic Marketing,<br>LLC | Communications Services |                     |                               | X                 | X                    | 2013608                       |                   |

\*Denotes certification by the California Unified Certification Program (CUCP).

\*\*Denotes certification by the State of California.

Attachment B

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**Disadvantaged Business Enterprise and Small Business Enterprise Status**

|                  | <b>Firm Name</b> | <b>Role on Project</b>                  | <b>DBE<br/>* Yes</b> | <b>If DBE Yes,<br/>List #</b> | <b>DBE<br/>No</b> | <b>SBE*<br/>*<br/>Yes</b> | <b>If SBE<br/>Yes,<br/>List #</b> | <b>SBE<br/>No</b> |
|------------------|------------------|-----------------------------------------|----------------------|-------------------------------|-------------------|---------------------------|-----------------------------------|-------------------|
| Prime Contractor | Kalamuna         | Website design and enhancement services |                      |                               | X                 | X                         | 2009467                           |                   |
| Subcontractor    | Convey, Inc.     | Website support services                | X                    | 38411                         |                   | X                         | 1367600                           |                   |

\*Denotes certification by the California Unified Certification Program (CUCP).

\*\*Denotes certification by the State of California.

Attachment C

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**Disadvantaged Business Enterprise and Small Business Enterprise Status**

Prime Contractor

| <b>Firm Name</b>                  | <b>Role on Project</b> | <b>DBE*<br/>Yes</b> | <b>If DBE Yes,<br/>List #</b> | <b>DBE<br/>No</b> | <b>SBE**<br/>Yes</b> | <b>If SBE Yes,<br/>List #</b> | <b>SBE<br/>No</b> |
|-----------------------------------|------------------------|---------------------|-------------------------------|-------------------|----------------------|-------------------------------|-------------------|
| Caribou Public Relations,<br>Inc. | Project Lead           | X                   | 41619                         |                   | No                   |                               |                   |

\*Denotes certification by the California Unified Certification Program (CUCP).

\*\*Denotes certification by the State of California.

**Request for Committee Approval**

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**Summary of Proposed Contract Amendment**

|                             |                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Work Item No.:              | 1252                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Consultant:                 | Polytechnic Marketing LLC<br>Berkeley, CA                                                                                                                                                                                                                                                                                                                                                                              |
| Work Project Title:         | FasTrak® Marketing and Customer Education                                                                                                                                                                                                                                                                                                                                                                              |
| Purpose of Project:         | Provide marketing and customer education in support of FasTrak®                                                                                                                                                                                                                                                                                                                                                        |
| Brief Scope of Work:        | Contractor shall provide advertising, material development and production, social media management and other services.                                                                                                                                                                                                                                                                                                 |
| Project Cost Not to Exceed: | \$2,600,000 (this amendment)<br><br>Total Contract value including amendments before this amendment is \$6,800,000<br><br>Total Contract amount with this amendment is \$9,400,000                                                                                                                                                                                                                                     |
| Funding Source:             | BATA Operating Funds                                                                                                                                                                                                                                                                                                                                                                                                   |
| Fiscal Impact:              | Funding to be included in the FY 2024-25 BATA Operating budget, subject to approval                                                                                                                                                                                                                                                                                                                                    |
| Motion by Committee:        | That the Executive Director or designee is authorized to negotiate and enter into a contract amendment with Polytechnic Marketing LLC for the services described above and in the Bay Area Toll Authority Oversight Committee Summary Sheet dated June 12, 2024 and that the Chief Financial Officer is authorized to set aside \$2,600,000 for such amendment, subject to the approval of the FY 2024-25 BATA budget. |
| Operations Committee:       | blank                                                                                                                                                                                                                                                                                                                                                                                                                  |
| blank                       | <hr/> Federal D. Glover, Chair                                                                                                                                                                                                                                                                                                                                                                                         |
| Approved:                   | June 12, 2024                                                                                                                                                                                                                                                                                                                                                                                                          |

**Request for Committee Approval**

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**Summary of Proposed Contract Amendment**

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|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Work Item No.:              | 1252                                                                                                                                                                                                                                                                                                                                                                                                     |
| Consultant:                 | Kalamuna Inc.<br>Oakland, CA                                                                                                                                                                                                                                                                                                                                                                             |
| Work Project Title:         | FasTrak® Website Development and Management Services                                                                                                                                                                                                                                                                                                                                                     |
| Purpose of Project:         | Provide website development and management services in support of FasTrak®                                                                                                                                                                                                                                                                                                                               |
| Brief Scope of Work:        | Contractor shall provide website implementation, content management system implementation and other services.                                                                                                                                                                                                                                                                                            |
| Project Cost Not to Exceed: | \$250,000 (this amendment)<br><br>Total Contract value including amendments before this amendment is \$1,000,000<br><br>Total Contract amount with this amendment is \$1,250,000                                                                                                                                                                                                                         |
| Funding Source:             | BATA Operating Funds                                                                                                                                                                                                                                                                                                                                                                                     |
| Fiscal Impact:              | Funding to be included in the FY 2024-25 BATA Operating budget, subject to approval                                                                                                                                                                                                                                                                                                                      |
| Motion by Committee:        | That the Executive Director or designee is authorized to negotiate and enter into a contract amendment with Kalamuna Inc. for the services described above and in the Bay Area Toll Authority Oversight Committee Summary Sheet dated June 12, 2024 and that the Chief Financial Officer is authorized to set aside \$250,000 for such amendment, subject to the approval of the FY 2024-25 BATA budget. |
| Operations Committee:       | blank                                                                                                                                                                                                                                                                                                                                                                                                    |
| blank                       | <hr/> Federal D. Glover, Chair                                                                                                                                                                                                                                                                                                                                                                           |
| Approved:                   | June 12, 2024                                                                                                                                                                                                                                                                                                                                                                                            |

**Request for Committee Approval**

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**Summary of Proposed Contract Amendment**

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| Work Item No.:              | 1252                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Consultant:                 | Caribou Public Relations, Inc.<br>Martinez, CA                                                                                                                                                                                                                                                                                                                                                                            |
| Work Project Title:         | FasTrak® Event-Based Outreach                                                                                                                                                                                                                                                                                                                                                                                             |
| Purpose of Project:         | Provide event-based outreach services in support of FasTrak®                                                                                                                                                                                                                                                                                                                                                              |
| Brief Scope of Work:        | Contractor shall schedule and staff outreach at public and community events and other services.                                                                                                                                                                                                                                                                                                                           |
| Project Cost Not to Exceed: | \$350,000 (this amendment)<br><br>Total Contract value including amendments before this amendment is \$600,000<br><br>Total Contract amount with this amendment is \$950,000                                                                                                                                                                                                                                              |
| Funding Source:             | BATA Operating Funds                                                                                                                                                                                                                                                                                                                                                                                                      |
| Fiscal Impact:              | Funding to be included in the FY 2024-25 BATA Operating budget, subject to approval                                                                                                                                                                                                                                                                                                                                       |
| Motion by Committee:        | That the Executive Director or designee is authorized to negotiate and enter into a contract amendment with Caribou Public Relations, Inc. for the services described above and in the Bay Area Toll Authority Oversight Committee Summary Sheet dated June 12, 2024 and that the Chief Financial Officer is authorized to set aside \$350,000 for such amendment, subject to the approval of the FY 2024-25 BATA budget. |
| Operations Committee:       | blank                                                                                                                                                                                                                                                                                                                                                                                                                     |
| blank                       | <hr/> Federal D. Glover, Chair                                                                                                                                                                                                                                                                                                                                                                                            |
| Approved:                   | June 12, 2024                                                                                                                                                                                                                                                                                                                                                                                                             |