

**Bay Area Toll Authority
Oversight Committee**

June 14, 2023

Agenda Item 4f - 23-0738

FasTrak® Customer Education and Marketing Contract Actions:

- i. Contract Amendment – Polytechnic Marketing LLC (Polytechnic) (\$2,600,000);**
 - ii. Contract Amendment – Kalamuna Inc. (Kalamuna) (\$400,000);**
 - 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 2023-24 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 2022-23 include developing a campaign to promote the new payment plan that will launch July 1, 2023 tabling at weekend community events, and development 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. Contract Amendment - Marketing: Polytechnic Marketing LLC (\$2,600,000)**

Polytechnic has provided marketing services for the last two 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 and managing a campaign to let express lane drivers know about the requirements for FasTrak® Flex and FasTrak® CAV (Clean Air Vehicle) toll tags, updating the FasTrak® handbook, producing an

insert for Interstate 880 express lane violators, 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 incentivize drivers to sign up for FasTrak[®] and a campaign to educate drivers about proposed changes in the High Occupancy Vehicle 2/3 policies for the BATA Toll Bridges. 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, 2024. 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. (\$400,000)

Kalamuna has provided website development and management support for the FasTrak[®] website for the last two years. In Fiscal Year 2022-23, Kalamuna developed a prototype for a new website design, provided translation for all the contents of the credentialed pages of the FasTrak[®] website, conducted several rounds of user testing, and began 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 and the MTC 2020 Electronic Payments Consultant Assistance Bench. On June 8, 2022, this Committee approved a contract amendment with Kalamuna to extend the work being performed. The requested amendment would add a not to exceed amount of \$400,000 and extend Kalamuna support through June 30, 2024. This amendment will allow Kalamuna to complete implementation of the new FasTrak[®] website, coordinate creation of a new content management system, and make changes in the website navigation based on user testing. Kalamuna is a Small Business Enterprise but not a Disadvantaged Business Enterprise and its subcontractor is both a Disadvantaged Business Enterprise and a Small 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 2022-23 included production of event materials such as tents, ambassador attire and other necessary materials for event-based outreach to promote FasTrak[®]. Caribou also began conducting ambassador outreach at multiple public 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, 2024. This amendment will allow Caribou to conduct a greater number of ambassador outreach events to promote adoption of FasTrak[®] in Fiscal Year 2023-24. 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 2023-24 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 \$400,000 to provide services as described herein, subject to the approval of the FY 2023-24 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 2023-24 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 blue ink that reads "Andrew B. Fremier". The signature is written in a cursive style with a large initial "A".

Andrew B. Fremier

Attachment A

Disadvantaged Business Enterprise and Small Business Enterprise Status

Firm Name	Role on Project	DBE* Yes	If DBE Yes, List #	DBE No	SBE** Yes	If SBE Yes, List #	SBE No
Prime Contractor Polytechnic Marketing, LLC	Communications Services			X	X	2013608	

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

**Denotes certification by the State of California.

Attachment B

Disadvantaged Business Enterprise and Small Business Enterprise Status

	Firm Name	Role on Project	DBE * Yes	If DBE Yes, List #	DBE No	SBE* * Yes	If SBE Yes, List #	SBE No
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

Disadvantaged Business Enterprise and Small Business Enterprise Status

Prime Contractor

Firm Name	Role on Project	DBE* Yes	If DBE Yes, List #	DBE No	SBE** Yes	If SBE Yes, List #	SBE No
Caribou Public Relations, 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

Summary of Proposed Contract Amendment

Work Item No.: 1252

Consultant: Polytechnic Marketing LLC
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)

Total Contract value including amendments before this amendment is \$4,200,000

Total Contract amount with this amendment is \$6,800,000

Funding Source: BATA Operating Funds

Fiscal Impact: Funding to be included in the FY 2023-24 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 14, 2023 and that the Chief Financial Officer is authorized to set aside \$2,600,000 for such amendment, subject to the approval of the FY 2023-24 BATA budget.

Operations Committee: blank

blank Federal D. Glover, Chair

Approved: June 14, 2023

Request for Committee Approval

Summary of Proposed Contract Amendment

Work Item No.: 1252

Consultant: Kalamuna Inc.
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: \$400,000 (this amendment)
Total Contract value including amendments before this amendment is \$600,000
Total Contract amount with this amendment is \$1,000,000

Funding Source: BATA Operating Funds

Fiscal Impact: Funding to be included in the FY 2023-24 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 14, 2023 and that the Chief Financial Officer is authorized to set aside \$400,000 for such amendment, subject to the approval of the FY 2023-24 BATA budget.

Operations Committee: blank

blank Federal D. Glover, Chair

Approved: June 14, 2023

Request for Committee Approval

Summary of Proposed Contract Amendment

Work Item No.: 1252

Consultant: Caribou Public Relations, Inc.
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)

Total Contract value including amendments before this amendment is \$250,000

Total Contract amount with this amendment is \$600,000

Funding Source: BATA Operating Funds

Fiscal Impact: Funding to be included in the FY 2023-24 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 14, 2023 and that the Chief Financial Officer is authorized to set aside \$350,000 for such amendment, subject to the approval of the FY 2023-24 BATA budget.

Operations Committee: blank

blank Federal D. Glover, Chair

Approved: June 14, 2023