



**Metro**

Los Angeles County  
Metropolitan Transportation Authority

One Gateway Plaza  
Los Angeles, CA 90012-2952

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**REVISED  
EXECUTIVE MANAGEMENT AND AUDIT COMMITTEE  
APRIL 16, 2009**

**SUBJECT: PS-7140-2313, RESEARCH SERVICES BENCH**

**ACTION: APPROVE RESEARCH SERVICES BENCH CONTRACT**

**RECOMMENDATION**

- A. Exempt the Research Services Bench Contract PS-7140-2313 from the consulting services freeze because the research performed supports effective planning and implementation of agency projects and programs, and collects the demographic information necessary to meet federal reporting requirements.
- B. Authorize the Chief Executive Officer to:
- Award a five-year firm fixed price Bench Contract, Contract No. PS-7140-2313, comprised of the following eight contractors and contract numbers, for research services in the amount not to exceed \$1,300,000, inclusive of two one-year options effective May 1, 2009:
- |  |                |
|--|----------------|
| Action Research, Inc                       | PS-7140-2313-1 |
| Applied Management & Planning Group (AMPG) | PS-7140-2313-2 |
| BW Research Partnership                    | PS-7140-2313-3 |
| EMC Research, Inc.                         | PS-7140-2313-4 |
| Fairbanks, Maslin, Maullin & Associates    | PS-7140-2313-5 |
| Moore & Associates                         | PS-7140-2313-6 |
| Q&A Research                               | PS-7140-2313-7 |
| Redhill Group, Inc.                        | PS-7140-2313-8 |
- Execute Task Orders under these contracts for research services in a total amount not to exceed \$1,300,000 for a period of performance of five years.

**RATIONALE**

This professional services bench contract will allow continued provision of research services that staff uses to fulfill data requests with short deadlines, to collect customer information, to monitor general public awareness and utilization of current programs, to obtain customer feedback on proposed new services, and to assess effectiveness and planning for service and program improvements. The bench provides pools of qualified contractors for each of seven

distinct research services. The bench members in each pool will compete for task orders on the basis of qualifications and price. The bench shortens the procurement process time from two to three months down to three to four weeks allowing staff to act quickly when research questions arise and response is needed with a short turn-around time. Staff is not obligated to make use of the bench's full spending authority, or to use the bench at all.

While a portion of the research will directly support Measure R, much of the research is being conducted to help us establish benchmarks in order to assist us as we move forward with our Measure R-related projects. Studies are conducted to ensure effective planning and implementation of projects and programs by measuring customer and general public response and/or travel behavior changes. This contract will also allow continued compliance with Title VI of the Civil Rights Act of 1964. Title VI compliance requires the collection and analysis of racial and ethnic data showing the extent to which members of minority groups are beneficiaries of programs receiving Federal financial assistance. Therefore, staff is requesting an exemption from the freeze on new consulting services recently adopted by the Board.

The seven research areas of expertise are: 1) station intercept and on-board transit surveys, 2) computer aided telephone interview (CATI) surveys, 3) focus group sessions, 4) data base development and coordination, 5) computer aided personal interview (CAPI) surveys, 6) customization of random digit dialing (RDD) samples for CATI surveys, and 7) online surveys.

### Background

This bench contract will replace the research bench contract that has been utilized over the last five years and has expired. Use of a bench contract has proven to dramatically reduce staff resources expended on the procurement of research services. Approximately thirty research studies were conducted under the last contract and cost \$1.27 million. The authorized amount under the last contract was \$1.4 million. The purpose of the research conducted under that contract was: 1) to collect federally required customer demographic information, 2) to respond to questions asked by the Board, and 3) to meet Board directives. Examples of the projects conducted under the previous contract include:

1. Semi-annual Customer survey to identify rider demographic information, fare media usage, customer experience while riding services and opinions on new products introduced.
2. Annual General Public survey to assess travel behavior, perceptions and awareness of Metro service from the general Los Angeles County population. The trend analysis of these surveys identified an increasing public perception of Metro which indicated to staff a stronger potential for passage of a sales tax measure (voter polls geared specifically for Measure R were conducted separate from this effort).
3. On-board survey of Metro Orange Line customers to determine travel behavior changes that occurred as a result of the new service. The study found that some customers were using the service as an extension of the Metro Red Line to North Hollywood and that some customers had shifted from drive-alone commuting on the US 101 Freeway.

4. Two parking lot surveys on the Metro Green Line to assess the relative merits of possible solutions to a shortage of parking spaces.
5. Focus groups of current transit users and non-users presenting proposed timetable changes to learn which changes provide the best information for riding the system.
6. Several individual bus line surveys, as requested by Service Sector staff, to gauge customer reactions to potential service changes.
7. Line by line results of the Customer survey to assist Service Sector staff assessment of operator courtesy, passenger safety, equipment reliability, and seat availability.
8. Gold Line Express Service focus groups of current Gold Line users and potential users presenting various environmental and operations enhancements to increase ridership on the Gold Line.
9. Focus groups of current transit users and non-users to identify the most effective images and messages that resonate with our users and potential users for upcoming information campaigns to raise awareness and encourage use of Metro services.

Staff is requesting a do-not-exceed amount of \$1.3 million for the new contract in an effort to keep expenditures within the same amount spent under the last contract. Given the increasing costs over the last 7 years, staff will conduct a fewer number of surveys during this five-year bench. For example, the customer and service delivery data was originally collected semi-annually. More recently, in an effort to reduce research costs, staff conducted the survey annually instead of semi-annually. We will continue to collect this information on an annual basis for the next five years to continue these savings. Similarly, the General Public survey will be performed every other year instead of on an annual basis.

### **FINANCIAL IMPACT**

This action does not commit any dollars to the contractors on the proposed bench. The total prior spending for the first five-year bench was \$1,300,000-\$1,270,000. In order Funding of \$434,000 for the bench is included in the FY09 budget in cost center 7160, Regional Communications in project number 420004, task #008109 Countywide Transportation Systems Awareness and Statistics. These activities are funded with Prop C25%. Staff is expecting to budget funding for Measure R-related research under this contract for in FY10 and may use this contract to perform the work. Since this is a multi-year bench, the cost center manager and Chief Communications Officer will be accountable for budgeting the cost in future years, including any option exercised. Each task order that is assigned to a bench contractor will be funded with the source of funding for tasks being performed. For example, it is possible that the bench could be used for a transit-related survey which would be funded by Enterprise Fund revenues. Approximately \$33,000 of Enterprise Funds revenues were used in prior years for an on-board service and equipment evaluation survey that used a contractor from the previous bench.

### **ALTERNATIVES CONSIDERED**

Two alternatives were considered: 1) performing all market and survey research work in-house, and 2) obtaining professional services as separate procurements.

Bringing the research in-house has benefits related to control of data definition and processing. However, the research program requires highly specialized equipment (e.g. Computer Assisted Telephone Interview hardware and software) that changes as research questions change and technology evolves, and large short-term labor requirements (e.g. surveyors on system wide on-board surveys) that are better handled by firms completely dedicated to these short-term projects. Using outside professional services allows staff to tailor the type of research employed to the question being answered.

Pursuing each research study as a separate procurement extends the time needed to conduct a study by as much as two months. These efforts invest comparatively large amounts of staff time in internal processes, and would make it difficult to complete the research conducted on an annual basis within the planned timeframe. Establishing a bench of pre-approved contractors would alleviate the duplication of effort involved with processing applications for many small projects separately.

## **ATTACHMENT**

- A. Procurement Summary
- B. Matrix of Approved Areas of Expertise

Prepared by: Jeff Boberg, Research Manager, Research & Development  
Cosette Stark, Director, Research & Development

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Matt Raymond  
Chief Communications Officer

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Arthur T. Leahy  
Chief Executive Officer

**BOARD REPORT ATTACHMENT A  
PROCUREMENT SUMMARY  
RESEARCH SERVICES BENCH**

1.	Contract Number: PS-7160-2313-1 – PS-7160-2313-8, in alpha order		
2.	Recommended Vendor: See Attachment A-2		
3.	Cost/Price Analysis Information: N/A Bench Contract		
	A. Proposed Price: \$ N/A	Recommended Price: Not to exceed \$1,300,000 for entire Task Order Contract	
	B. Details of Significant Variances are in Attachment A-1.D N/A		
4.	Contract Type: Firm Fixed Price		
5.	Procurement Dates:		
	A. Issued: 16 January 2009		
	B. Advertised: 14 & 15 January 2009		
	C. Pre-proposal Conference: 21 January 2009		
	D. Proposals Due: 4 February 2009		
	E. Pre-Qualification Completed: Estimated completion date is 19 February 2009.		
	F. Conflict of Interest Form Submitted to Ethics: 11 February 2009		
6.	Small Business Participation:		
	A. Bid/Proposal: 15 % DALP	Date Small Business Evaluation Completed: March 16, 2009	
	B. Small Business Commitment: See Details in Attachment A-2		
7.	Request for Proposal Data:		
	Notifications Sent: 30	Proposals Picked up: 8	Proposals Received: 8
8.	Evaluation Information:		
	A. Proposers Names: 1. Action Research 2. AMPG 3. BW Research 4. EMC Research 5. Fairbank & Maslin 6. Moore & Associates 7. Q & A Research 8. Red Hill Group	Proposal Amount N/A	Best and Final Offer Amount N/A
	B. Evaluation Methodology: See Details in Attachment A-1.C		
9.	Protest Information:		
	A. Protest Period End Date: 24 March 2009		
	B. Protest Receipt Date: None Received		
	C. Disposition of Protest Date: None Received		
10.	Contract Administrator: Bassar Richardson	Telephone Number: 213.922.4596	
11.	Project Manager: Jeff Boberg	Telephone Number: 213.922.7659	

**BOARD REPORT ATTACHMENT A-1  
PROCUREMENT HISTORY**

**RESEARCH SERVICES BENCH**

A. Background on Contractor

Applied Management & Planning Group (AMPG)  
11500 W. Olympic Blvd. Suit 626  
Los Angeles, California 90064

AMPG, established in 1998, is a certified small and woman-owned business (SBE/WBE) consisting of highly qualified professionals with multidisciplinary backgrounds. AMPG staff has an array of experience in all aspects of primary data collection, from intercept and on-board surveys, to in-person and telephone interviews, as well as focus groups, statistical sampling design, and data analysis.

Past Metro projects AMPG has worked on include Customer Satisfaction surveys, General Public Tracking surveys, and On-Board Survey for several bus lines. AMPG has always produced satisfactory work. Furthermore, AMPG has done work for several municipalities, such as Memphis, Tennessee and Riverside Counties Transit Authorities.

Action Research, Inc.  
910 W. San Marcos Blvd. #108  
San Marcos, California 92078

Action Research, Inc. has 15 years of experience collecting survey data for large national-level projects, as well as local public agencies. Action Research, Inc. has current and ongoing work with the City of San Diego, the United Port of San Diego, U.S. Department of Energy and the U.S. Environmental Protection Agency to name a few. Metro has not had any prior experience with Action Research Inc., but feels confident in its ability to provide Metro with a quality product.

BW Research Partnership  
2541 State Street, Suite 108  
Carlsbad, California 92008

BW Research Partnership (BW Research) founded in 2006, is a certified woman-owned small business with offices in Carlsbad and San Jose, California. BW Research is a full-service market research firm that specializes in public opinion, customer, economic, and voter research for public entities including transportation agencies, cities, counties and other municipal agencies. Relevant projects the BW Research has worked on in the past or are currently working on in California include Metropolitan Transportation Commission, numerous Metrolink Studies and the Regional Airport System Plan Analysis for several Bay Area transportation agencies.

EMC Research, Inc  
436 14<sup>th</sup> Street  
Oakland, California 94621

EMC Research, Inc, founded in 1989, is a full service opinion research and strategic consulting firm serving a broad range of public and private sector clients. EMC's past and current clients include Puget Sound Regional Transit Agency, Bay Area Rapid Transit, MARTA in Atlanta, and Alameda County Transportation Improvement Authority to name a few. EMC's experience includes on-board intercept surveys, rider satisfaction surveys, focus group studies and market segmentation studies. Metro has been satisfied with EMC's performance in the past.

Fairbank, Maslin, Maullin & Associates  
2425 Colorado Ave, Suite 180  
Santa Monica, California 90404

Fairbank, Maslin, Maullin & Associates (FMM&A), a California corporation, has specialized in public policy-oriented opinion research since the company was first organized in 1981. The firm is especially experienced in conducting research for government jurisdictions, corporations, private and non-profit organizations to support the planning, development, implementation, and evaluation of media campaigns, and public policy programs. Many of the current and past projects are as follows: Los Angeles County Water Quality Measure Survey, The Southern California Association of Governments Congestion Pricing Survey, and Los Angeles County Metropolitan Transportation Authority Measure R. Metro has been satisfied with the Contractor's performance.

Moore & Associates, Inc.  
28159 Stanford Ave., Suite 110  
Valencia, California 91355

Moore & Associates, Inc. provides professional transportation consulting services to a client base composed exclusively of public transportation organizations. Founded in 1991 and incorporated in California, Moore & Associates, Inc. offers a full menu of transportation-specific market research services including survey design, direct mail, sampling plans, data collection via on-board, intercept telephone, data cleaning and coding. Moore & Associates has provided services to several transportation agencies, such as Metrolink, Foothill Transit, Monterey-Salinas Transit, and the Tri Delta Transit.

Q & A Research  
64 Digital Dr.  
Novato, California 94949

Q & A Research is a full service market research provider headquartered in the San Francisco Bay Area. Founded in 1991, Q & A Research has offered quality research, high-level analysis and fast turnarounds. Q & A has provided services to a variety of customers as follows: Bay Area Rapid Transit (BART), Wells Fargo Small Bank Payroll, Allstate Customer Recovery Study and American Honda Motors.



Redhill Group  
18008 Skypark Circle Suite 145  
Irvine, California 92614

Redhill Group is a national leader in the field of transportation research. Over the past 20 years Redhill Group has conducted well in excess of 100 transportation research projects for transportation providers and metropolitan planning organizations. Redhill Group offers extensive experience in public transit and some of their customers include Metro, BART, Washington Metropolitan Area Transit Authority, OCTA and Metrolink. Metro currently has a contract with Redhill Group and is very satisfied with their work product.

### B. Procurement Background

These Professional Services Bench contracts are anticipated to total a Not-To-Exceed value of \$2,000,000 in task orders over the life of the Bench, which is five years inclusive of two one-year options. Task Orders will be issued for each Statement of Work and will be competed only among those Bench contractors qualified for that research expertise area (see Attachment B). Task Order awards will be made to the Bench contractor with the lowest evaluated proposal based on technical and price factors. Each Bench contractor will have expertise in a minimum of one of the following research services:

1. Station intercept and on-board transit surveys
2. Computer aided telephone interview (CATI) surveys
3. Focus group sessions
4. Data coding, Data base development and coordination of existing datasets
5. Computer aided personal interview (CAPI) surveys and other methods to determine non-response bias
6. Customization of RDD telephone samples to geographic or demographic specifications
7. Online polling/survey techniques

A fair and reasonable price determination will be made for each task order prior to award of the task order.

### C. Evaluation of Proposals

Competitive qualification statements were sought and evaluated by a Source Selection Committee and all proposals were evaluated to be technically competent to perform required work in the modeling categories proposed.

The Request for Proposal (RFP) contained neither price nor a specific statement of work. Each Task Order will contain a specific statement of work, which will be sent to all bench contractors qualified in that specific modeling area. The Bench contractors will propose competitively for the work under the task order.

Placement on the Bench will not guarantee an award of any Task Order.

D. Cost/Price Analysis Explanation of Variances

Task Orders will be issued for each contract on the Bench and awarded based on the following criteria:

1. Technical Approach
2. Schedule Realism
3. Price

**BOARD REPORT ATTACHMENT A-2  
LIST OF SUBCONTRACTORS  
RESEARCH SERVICES BENCH**

**PRIME CONTRACTOR**

Action Research

Applied Management & Planning Group

BW Research

EMC Research

Fairbank, Maslin, Maullin & Associates

Moore & Associates

Q & A Research

Redhill Group

**OTHER SUBCONTRACTORS**

Interviewing Services of America

Interviewing Services of America  
T.E.M.P.S. Inc.  
Fred Britton

I/H/R Research Group

Universal Survey Center  
Adept Consulting  
Scientific Telephone Samples

Research America Inc.  
Kandi Reyes & Associates  
Scientific Telephone Samples  
Atkins Research Group, Inc.  
Meczka Marketing/Research/Consulting Inc.  
Garcia Research Assoc.  
Verbatim Response  
McGuire Research Services  
Communications Center Inc.

T.E.M.P.S., Inc.  
Malvada Group

Facts 'n Figures

None

Small Business Commitment (DALP):

**Applied Management & Planning Group**

DBE Subs: T.E.M.P.S., Inc.

**Fairbank, Maslin, Maullin & Assoc.**

DBE Subs: Garcia Research Associates, Inc.  
Kandi Reyes & Associates

**Moore & Associates**

DBE Subs: T.E.M.P.S., Inc.  
Malvada Group, LLC

Total DALP % Commitment: To be determined as task orders are awarded

**BOARD REPORT ATTACHMENT B  
MATRIX OF APPROVED AREAS OF EXPERTISE**

**RESEARCH SERVICES BENCH**

An "X" indicates which area of expertise a bench member is approved to compete.

	Expertise Area #1	Expertise Area #2	Expertise Area #3	Expertise Area #4	Expertise Area #5	Expertise Area #6	Expertise Area #7
	On-Board Surveys	CATI Surveys	Focus Groups	Customized Datasets	CAPI Surveys	RDD sample	On-line Surveys
Action Research Group	X	X	X		X		X
AMPG	X	X	X		X	X	X
BW Research		X		X		X	X
EMC		X	X			X	
Fairbanks, Maslin		X	X			X	X
Moore & Associates	X						
Q & A		X	X		X		X
Redhill Group	X	X	X	X	X	X	