

Metropolitan Transportation Commission
Administration Committee

January 11, 2023

Agenda Item 2f

**Contract Amendment – Continuous Travel Diary Survey: Resource Systems Group
(\$720,000)**

Subject:

Approval of a contract amendment in an amount not to exceed \$720,000, with Resource Systems Group, Inc. (RSG) for the 2021 Travel Diary Survey (“Project”).

Background:

In April 2022, this Committee approved three pre-qualified firms to the 2021 Travel Diary Survey Program consultant bench (ETC Institute, RSG, and Westat) to provide services related to a travel diary smartphone application (“App”) customization and trial test. The consultant bench is referred to as the 2021 Travel Diary Survey Program throughout this summary sheet to be consistent with the language of the original procurement, though the full scope of this contract will begin in 2023.

Travel diary surveys (also known as “household travel surveys”) have been collected in the Bay Area approximately once a decade since 1965. Data collected includes travel trip and mode information in combination with household and person demographics. This data is used to refine MTC analytical planning tools, including the MTC travel model, and to inform planning studies and equity analyses, among many other applications.

MTC is embarking on a program of more regular travel diary data collection, likely biennially (every other year), and staff is currently developing the survey scope and methods. Historically, travel diary data has been collected via paper, telephone, and internet methods. More recently, due to the penetration of smartphone ownership, such data can now be collected more accurately and comprehensively with smartphone Apps (augmented with other methods for non-smartphone owning populations). Given the importance of the smartphone method to overall project success, the first phase of this procurement included a trial test and scoring of the bench vendors’ travel diary smartphone Apps.

For the trial test, staff recruited over 40 volunteers from MTC and partner agencies to test each firm’s travel diary smartphone App and to score them, 1 to 5 (5 being best), on a range of criteria. Average trial test participant scores are summarized by criterion below:

Evaluation Criteria	RSG	Westat	ETC Institute
Ease of recruitment and startup	4.2	3.6	4.3
User interface attractiveness	3.7	2.9	4.2
Intuitiveness of App prompts for trip details	4.2	3.6	3.2
Battery life during App trial test period	3.8	2.0	3.6
Ease of adding trips not captured by App	3.8	3.1	2.7
Ease of merging trips if mistakenly added by App	4.3	4.2	3.4
Proxy reporting of kids’ travel	3.9	3.5	2.3
Question categories appropriate and exhaustive	4.3	4.0	3.8
Questions intuitive, easy to understand	4.4	4.2	4.0
Was auto-population of fields helpful	4.5	4.0	3.6
Recording multiple modes for transit trips	4.0	3.4	3.9
Start/end times and locations correct	4.5	4.0	3.7
Overall score (1-10, 10 being best)	7.8	5.6	6.8
Participants ranking App first place (out of 25 participants)	17	2	6

Based on the evaluation of firms’ Statements of Qualifications (SOQ) and the trial test, staff recommends the direct selection of RSG for the Project. RSG scored highest in most categories of the App trial test, including the overall score. Among the 25 people who tested all three Apps (many people tested only two), 17 (68 percent) preferred the RSG App, while only 2 (8 percent) preferred Westat’s App and 6 (24 percent) preferred ETC Institute’s App. In addition, RSG did a better job of managing the App test than the other firms (e.g., their communication was better, the quality of their deliverables was better, and they took initiatives such as buying a survey URL for branding the exercise). Finally, the quality of RSG’s final data deliverables was deemed best by the original SOQ evaluation panel comprised of MTC and San Francisco County

Transportation Authority (SFCTA) staff. Based on the strength of its SOQ and performance in the App trial test, the MTC and SFCTA evaluation panel was unanimous in directly selecting RSG as the single consultant chosen to perform the Project.

RSG's strong performance in the App trial test demonstrated that they should provide superior service in collecting travel diary data for the Project. Their App captures accurate data and is well received by users, and RSG is a highly experienced and skilled firm in designing travel diary surveys and producing quality deliverables.

Attachment A includes a list of RSG's Small Business Enterprise (SBE) and Disadvantaged Business Enterprise (DBE) status.

Issues:

None identified.

Recommendations:

Staff recommends that the Committee authorize the Executive Director or designee to enter into a contract amendment in an amount not to exceed \$720,000, for a total contract not-to-exceed amount of \$730,000, with RSG for the 2021 Travel Diary Survey.

Attachments:

- Attachment A: Disadvantaged Business Enterprise and Small Business Enterprise Status
- Request for Committee Approval – Summary of Proposed Contract Amendment


Andrew B. Fremier

Disadvantaged Business Enterprise and Small Business Enterprise Status

	Firm Name	Role on Project	DBE* Yes / No	If DBE Yes, List #	SBE** Yes / No	If SBE Yes, List #
Prime Contractor	Resource Systems Group, Inc.	Prime Data Collection Consultant	No		No	
Subcontractor	Visions, Inc.	Printing and Mailing Services	Yes	45347	No	
Subcontractor	Convey (Rosemont Enterprises, Inc.)	Outreach	Yes	38411	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.: 1122

Consultant: Resource Systems Group, Inc. (RSG)
San Diego, CA

Work Project Title: 2021 Travel Diary Survey

Purpose of Project: To collect travel diary survey data, including travel trip and mode information in combination with household and person demographics. This data is used to refine MTC analytical planning tools, including the MTC travel model; to inform planning studies and regional plans, including Plan Bay Area; to support equity analyses; and other applications.

Brief Scope of Work: RSG will develop and administer travel diary surveys to Bay Area households to collect representative travel and demographic data.

Project Cost Not to Exceed: This amendment: \$720,000
Current contract amount before this amendment: \$10,000
Maximum contract amount after this amendment: \$730,000

Funding Source: FTA 1602 and General Funds

Fiscal Impact: \$720,000 is included in the FY 2022-23 Agency Budget

Motion by Committee: That the Executive Director or designee is authorized to negotiate and enter into a contract amendment with RSG for collecting travel diary survey data as described above and in the Administration Committee Summary Sheet dated January 11, 2023 and the Chief Financial Officer is authorized to set aside an amount not to exceed \$720,000 for such contract amendment.

Administration Committee:

Federal D. Glover, Chair

Approved: January 11, 2023