

**Metropolitan Transportation Commission
Administration Committee**

April 13, 2022

Agenda Item 4b - 21-1632

**Consultant Bench and Contracts: Continuous Travel Diary Survey Smartphone
Application Evaluation**

(ETC Institute; Resource Systems Group; and Westat) (\$10,000 each)

Subject:

This memorandum requests approval of a pre-qualified bench of firms to the Travel Diary Survey Smartphone Application Evaluation bench (ETC Institute, Resource Systems Group, and Westat) to provide services related to a smartphone application customization and demonstration for MTC's travel diary survey program.

In addition, per the terms of the Request for Qualifications (RFQ) that was issued to establish this bench, staff is seeking approval of an award of individual contracts to each pre-qualified firm in the amount of \$10,000 to complete phase 1 of the Travel Diary Survey Smartphone Application project. Phase 1 will commence upon approval and extend for a period through June 30, 2023, with an option to extend for an additional two (2) year.

Background:

Travel diary surveys (also known as "household travel surveys") have been collected in the Bay Area approximately once a decade since 1965. Data collected include 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.

While standard practice has been to administer travel diary surveys roughly once every 10 years, going forward there are compelling reasons for MTC to perform smaller, but more regular data collection efforts: (1) a large decennial survey effort requires an outsized budget item for the survey year, while more frequent surveying balances costs, particularly survey administration costs, over a longer period; (2) survey technologies are evolving rapidly, including smartphone applications (apps) that greatly reduce survey burden and cost; and (3) the pace of new travel trends is evolving quickly, and a once-every-decade survey misses many behavioral changes.

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 have 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 has been developed in two stages, which comprise: (1) issuance of an RFQ to create a pre-qualified consultant bench; and (2) evaluating the bench vendors' travel diary smartphone apps. This memo requests authorization to enter into contracts for the first phase, creating the bench to facilitate smartphone app evaluations. A single consultant among the three, based on an evaluation of their app and overall proposal, will be chosen to do the subsequent above-described data collection work. Staff will return to this committee at the time the single consultant is chosen.

Procurement:

MTC issued a Request for Qualifications (RFQ) on January 19, 2022, to create a pre-qualified bench of consultants. Each pre-qualified Consultant on the bench will customize their existing travel diary smartphone applications for the Bay Area, and MTC and partner agency staff will evaluate vendor apps in a range of travel conditions for quality and accuracy.

Email notification of the RFQ was sent to over 3,751 individuals and firms. Staff hosted a pre-proposal conference in January 2022, via Zoom, which provided opportunities for the firms to ask questions about upcoming project opportunities and the procurement process. The pre-proposal conference was attended by 20 individuals. On February 16, 2022, MTC received four Statements of Qualifications (SOQs).

An evaluation panel comprised of MTC staff and one staff member each from San Francisco County Transportation Agency (SFCTA) and Puget Sound Regional Council (PSRC) reviewed applicants based upon the following evaluation criteria:

Evaluation Criteria	Percentage
Individual and Team Experience	30%

Evaluation Criteria	Percentage
Experience Deploying Travel Diary Smartphone Applications	20%
Experience and Approach to Assuring Data Integrity	20%
Cost Effectiveness	15%
Presentation	15%
Possible Total Score	100%

Three of the four firms who submitted a SOQs – ETC Institute, Resource Systems Group, Inc. (RSG), and Westat – demonstrated strong experience and expertise with the collection of travel diary survey data, an understanding of project goals and research needs, and the ability to complete the work plan within the required timeframe and budget. Each member of the evaluation panel recommended ETC Institute, RSG, and Westat to be pre-qualified for the bench. The four consultant teams and their average scores from the evaluation are listed below.

Consultant Team	Average Score
ETC Institute	92.0
Resource Systems Group, Inc. (RSG)	89.8
Westat	88.0
Ascendal Group LLC	71.6

Attachment A includes a list of the recommended firms' Small Business Enterprise (SBE) and Disadvantaged Business Enterprise (DBE) status.

Issues:

None identified.

Recommendations:

Staff recommends that the Administration Committee approve ETC Institute, Resource Systems Group, and Westat for the Travel Diary Survey Smartphone Application Evaluation bench and award contracts in a not to exceed amount of \$10,000 to each firm to provide a travel diary

smartphone application for testing and evaluation, for a period through June 30, 2023, with an option to extend for an additional two (2) years.

Attachments:

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



Therese W. McMillan

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	ETC Institute	Project Lead			No			No
Prime Contractor	Resource Systems Group, Inc. (RSG)	Project Lead			No			No
Prime Contractor	Westat	Project Lead			No			No

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

**Denotes certification by the State of California.

Request for Committee Approval

Summary of Proposed Consultant Bench and Contracts

Work Item No.: 1122

Consultant: ETC Institute, Resource Systems Group, Inc. (RSG), and Westat

Work Project Title: Continuous Travel Diary Survey Smartphone Application Evaluation.

Purpose of Project: Provide travel diary smartphone application for testing and evaluation.

Brief Scope of Work: As part of a two-stage procurement, creation of a consultant bench to evaluate consultant travel diary smartphone applications (apps) of each pre-qualified consultant on the bench. A single consultant among the three, based on an evaluation of their app and overall proposal, will be chosen to do the subsequent above-described data collection work. Staff will return to this committee at the time the single consultant is chosen.

Project Cost Not to Exceed: \$10,000 for each consultant.

Funding Source: CPG federal funding.

Fiscal Impact: Funding for initial contracts is included in the MTC fiscal year 2021-22 budget.

Motion by Committee: That ETC Institute, RSG, and Westat are approved for the Travel Diary Survey Smartphone Application Evaluation bench and that the Executive Director or designee be authorized to negotiate and enter into a contract with each firm not to exceed \$10,000 to provide a travel diary survey application for testing and evaluation through June 30, 2023, with an option to extend for an additional two (2) years as described above and in the Administration Committee Summary Sheet dated April 13, 2022, and the Chief Financial Officer is authorized to set aside funds as described above for such contracts.

Administration Committee:

Federal D. Glover, Chair

Approved: April 13, 2022