

**Metropolitan Transportation Commission**

**Administration Committee**

**July 12, 2023**

**Agenda Item 2d - 23-0842**

**2021 Travel Diary Survey Program:**

**Contract Amendment with Resource Systems Group (\$770,300); Funding Agreement with San Francisco County Transportation Authority (\$270,000)**

---

**Subject:**

Request to authorize the Executive Director to negotiate and enter into: 1) a contract amendment with Resource Systems Group, Inc. (RSG) in an amount not to exceed \$770,300 for the 2021 Travel Diary Survey Program (“Project”) and 2) a funding agreement with San Francisco County Transportation Authority (SFCTA) for \$270,000 to receive funding for the Project. Additional funding for the Project will come from (2) Santa Clara Valley Transportation Authority (SCVTA) for \$100,300; (3) Bay Area Toll Authority (BATA) for \$150,000; (4) Bay Area Infrastructure Financing Authority (BAIFA) for \$150,000; and SR37 Capital Budget for \$100,000.

**Background:**

Following a competitive procurement, in April 2022, this Committee authorized an agreement with RSG to provide services related to a travel diary smartphone application customization and trial test. In January 2023, staff returned to this Committee to amend RSG’s contract to fund the first full phase of the Project.

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.

Unlike previous survey efforts, for this Project MTC has embarked on a program of more regular, biennial (every other year) travel diary data collection. Additionally, while past travel diary data has been collected via paper, telephone, and internet methods, due to the proliferation of smartphone ownership, such data can now be collected more accurately and comprehensively with smartphone applications (augmented with other methods for representative surveying).

Since the kickoff of the full Project scope in January 2023, staff have worked with RSG to develop the survey instruments and sampling plan, to administer an MTC and partner agency pilot of the instrument and survey approach, and to begin public deployment of the survey to Bay Area households. Approximately a quarter of the households planned for this data collection cycle have been recruited for spring 2023 and the remaining three quarters will be recruited in the fall.

MTC staff have reached out to other stakeholders, both outside and within MTC, to partner in this effort. Under this arrangement, MTC pays for a baseline nine-county regional survey and other entities can pay a marginal survey cost (i.e., cost per additional surveyed household) to augment data collection within their jurisdiction.

Both SFCTA and SCVTA have elected to partner with MTC on this Project to augment data collection within their jurisdictions. The Executive Director will execute an agreement with SCVTA to receive its contribution of funding under the Executive Director's contract signature authority. Additionally, MTC is funding an oversample of households likely to use Bay Area Express Lane facilities (using funding provided by BATA and BAIFA), and households likely to use State Route 37 (SR37).

This amendment will allow for this additional work as contemplated by MTC, plus the augmented data collection as requested by MTC's partners.

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 to negotiate and enter into: 1) a contract amendment with Resource Systems Group, Inc. (RSG) in an amount not to exceed \$770,300 for the 2021 Travel Diary Survey Program ("Project"), for a total contract amount not to exceed \$1,500,300 and 2) a funding agreement with SFCTA for \$270,000 to receive funding for the Project.

**Attachments:**

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



---

Andrew B. Fremier

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

	<b>Firm Name</b>	<b>Role on Project</b>	<b>DBE* Yes / No</b>	<b>If DBE Yes, List #</b>	<b>SBE** Yes / No</b>	<b>If SBE Yes, List #</b>
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 Funding Agreement**

Work Item No.: 1122

Partner: San Francisco County Transportation Authority (SFCTA) - \$270,000

Work Project Title: 2021 Travel Diary Survey Program

Purpose of Project: To fund an augmented travel diary sample for households in San Francisco and Santa Clara Counties and for potential users of Bay Area Express Lane facilities and State Route 37, and to conduct additional analysis.

Brief Scope of Work: MTC shall pass these funds through to RSG to conduct an augmented sample of Bay Area households and to conduct additional analysis.

Project Cost Not to Exceed: Total Incoming Project funds to approve: \$770,300

Funding Source: SFCTA funding agreement; VTA funding agreement; BATA; BAIFA

Fiscal Impact: \$770,300, of which \$270,000 is from SFCTA, \$100,300 is from VTA, and \$400,000 is included in the FY 2023-24 Agency BATA, BAIFA & MTC budgets

Motion by Committee: That the Executive Director or designee is authorized to negotiate and enter into a funding agreement with San Francisco County Transportation Authority (SFCTA) for \$270,000 to receive funding for the 2021 Travel Diary Survey Program

Administration Committee:

---

Gina Papan, Chair

Approved: July 12, 2023

**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 Program

Purpose of Project: To augment data collection within San Francisco and Santa Clara Counties. Additionally, to oversample households likely to use Bay Area Express Lanes and State Route 37 and conduct additional analysis.

Brief Scope of Work: RSG will administer additional travel diary surveys in targeted Bay Area geographies to facilitate an augmented sample of representative travel and demographic data, and to conduct additional analysis.

Project Cost Not to Exceed: This amendment: \$770,300  
Current contract amount before this amendment: \$730,000  
Maximum contract amount after this amendment: \$1,500,300

Funding Source: SFCTA funding agreement (\$270,000), SCVTA funding agreement (\$100,300), BATA (\$150,000), BAIFA (\$150,000), and SR37 Capital Budget (\$100,000)

Fiscal Impact: SFCTA and SCVTA will provide combined funding of \$370,300. \$400,000 (BATA, BAIFA, and SR37 Capital Budget funding) is included in the FY 2023-24 Agency Budget

Motion by Committee: That the Executive Director or designee is authorized to negotiate and enter into a contract amendment with RSG in the amount of \$770,300 for the 2021 Travel Diary Survey Program as described above and in the Administration Committee Summary Sheet dated July 12, 2023, and the Chief Financial Officer is authorized to set aside an amount not to exceed \$770,300 for such contract amendment.

Administration Committee:

---

Gina Papan, Chair

Approved: July 12, 2023