

**Metropolitan Transportation Commission
Administration Committee**

December 13, 2023

Agenda Item 2c - 23-1141

**Contract – BART Transit Passenger Survey: ETC Institute (\$900,000); and Caltrain
Transit Passenger Survey: Resource Systems Group, Inc. (\$300,000)**

Subject:

Request to authorize the Executive Director to negotiate and enter into: 1) a contract with ETC Institute for an amount not to exceed \$900,000 to survey BART transit passengers, and 2) a contract with Resource Systems Group, Inc. (RSG) for an amount not to exceed \$300,000 to survey Caltrain transit passengers. These surveys are conducted as part of the 2023 Transit Passenger Surveying Services Bench (“Project”).

Background:

MTC collects travel behavior and demographic data for the region’s transit passengers to serve two agency needs. The first is to assist with Title VI of the 1964 Civil Rights Act compliance for regional expenditures and to facilitate various transit rider equity analyses. The second goal is to collect passenger travel pattern data for the refinement of MTC and partner agencies’ analytical planning tools, including regional and county-level travel demand models.

As part of regional Resolution 3866, the Transit Coordination Implementation Plan, MTC collects transit passenger demographic and travel pattern information in cooperation with transit agencies. Given the size of the regional transit fleet, such data collection takes five years to complete a full cycle of all Bay Area Transportation Development Act-claiming operators, surveying a few operators every spring and every fall. This program was suspended during the Covid pandemic and is now resuming its cadence, starting with the BART and Caltrain surveys. Post-pandemic, MTC is attempting to keep the sequence of operators surveyed in the same order as data had been collected prior to 2020.

Procurement:

MTC issued a Request for Qualifications (RFQ) on June 29, 2023, to procure a bench of consultants or consultant teams to conduct the Project. Required services shall be authorized by Contract or Purchase Order and will be based on the Preliminary Scope of Work included in the RFQ. The RFQ allowed for services through June 30, 2028, with the option to renew through

2030. In September 2023, the Administration Committee approved a pre-qualified consultant panel of the following three firms: Corey, Canapary & Galanis; ETC Institute; and RSG.

Bench consultants for the BART and Caltrain surveys were chosen via a direct select process. For each survey, the three pre-qualified consultants were provided a detailed statement of project goals. They were then asked to prepare a 5–7-page written response that described their project approach and methodology and were also invited to participate in a one-hour interview to present their proposal and respond to questions. ETC Institute was selected for the BART survey based on their project team and approach, and RSG was selected to administer the Caltrain survey.

Attachment A includes a list of ETC Institute and RSG and their subcontractors Small Business Enterprise (SBE) and Disadvantaged Business Enterprise (DBE) status.

Issues:

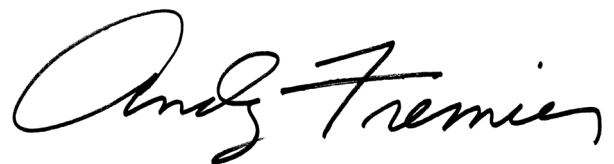
None identified.

Recommendations:

Staff recommends that the Committee authorize the Executive Director or his designee to negotiate and enter into a contract in an amount not to exceed \$900,000 with ETC Institute for a survey of BART passengers and to negotiate and enter into a contract in an amount not to exceed \$300,000 with RSG for a survey of Caltrain passengers.

Attachments:

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



Andrew B. Fremier

Attachment A

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	ETC Institute	Prime	No		No	
Subcontractors	Resource Systems Group, Inc.	Subconsultant	No		No	
	WSP	Subconsultant	No		No	
	ANIK Int	Subconsultant	Yes	42570	No	
Prime Contractor	Resource Systems Group, Inc.	Prime	No		No	
	ANIK Int	Subconsultant	Yes	42570	No	
	Ebony Marketing Systems	Subconsultant	Yes	43583	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 Contract for BART Passenger Survey

Work Item No.:	1122
Consultant:	ETC Institute, Olathe, KS
Work Project Title:	2023 Transit Passenger Surveying Services Bench
Purpose of Project:	Collect and analyze Bay Area regional transit passenger data in support of Title VI of the 1964 Civil Rights Act compliance, and to provide necessary data for the refinement of regional travel models.
Brief Scope of Work:	Perform a survey of BART passengers, capturing origin and destination locations and other trip milestones along with passenger household and person demographics.
Project Cost Not to Exceed:	\$900,000
Funding Source:	FY2023-24 budget: FTA 1602 (\$720,000) BART Funding Agreement (\$180,000)
Fiscal Impact:	\$720,000 (FTA 1602) is included in the FY 2023-24 Agency Budget. BART will provide funding of \$180,000 in FY 2023-24.
Motion by Committee:	That the Executive Director or designee is authorized to negotiate and enter into a contract with ETC Institute for a survey of BART passengers described above and in the Administration Committee Summary Sheet dated December 13, 2023 for an amount not to exceed \$900,000 and that the Chief Financial Officer is authorized to set aside an amount not to exceed \$900,000 for such contract, subject to budgetary approval as described above.
Administration Committee:	<hr/> Gina Papan, Chair
Approved:	December 13, 2023

Request for Committee Approval

Summary of Proposed Consultant Contract for Caltrain Passenger Survey

Work Item No.:	1122
Consultant:	Resource Systems Group, Inc., San Diego, CA
Work Project Title:	2023 Transit Passenger Surveying Services Bench
Purpose of Project:	Collect and analyze Bay Area regional transit passenger data in support of Title VI of the 1964 Civil Rights Act compliance, and to provide necessary data for the refinement of regional travel models.
Brief Scope of Work:	Perform a survey of Caltrain passengers, capturing origin and destination locations and other trip milestones along with passenger household and person demographics.
Project Cost Not to Exceed:	\$300,000
Funding Source:	FY2023-24 budget: FTA 1602 (\$240,000) Caltrain Funding Agreement (\$60,000)
Fiscal Impact:	\$240,000 (FTA 1602) is included in the FY 2023-24 Agency Budget. Caltrain will provide funding of \$60,000 in FY 2023-24.
Motion by Committee:	That the Executive Director or designee is authorized to negotiate and enter into a contract with Resource Systems Group, Inc. for a survey of Caltrain passengers described above and in the Administration Committee Summary Sheet dated December 13, 2023, for an amount not to exceed \$300,000 and that the Chief Financial Officer is authorized to set aside an amount not to exceed \$300,000 for such contract, subject to budgetary approval as described above.
Administration Committee:	<hr/> Gina Papan, Chair
Approved:	December 13, 2023