



January 12, 2023

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Amendment to Agreement for Schedule Checking Services

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Overview

On January 14, 2019, the Board of Directors approved an agreement with National Data and Surveying Services, Inc., doing business as Southland Car Counters, to perform manual observation and collection of bus ridership and performance information for fixed-route services, referred to in the transit industry as schedule checking. This agreement has an initial term of three years and includes two, one-year option terms. The first option term expires January 31, 2023.

Recommendation

Authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-8-1850 between the Orange County Transportation Authority and National Data and Surveying Services, Inc., doing business as Southland Car Counters, to exercise the second option term of the agreement, in the amount of \$164,212, to continue providing manual observation and collection of bus ridership and performance information for fixed-route services, referred to as schedule checking activities. This will increase the maximum obligation of the agreement to a total contract value of \$929,353.

Discussion

On January 14, 2019, the Orange County Transportation Authority's (OCTA) Board of Directors (Board) approved the selection of National Data and Surveying Services, Inc., doing business as Southland Car Counters, to perform manual observation and collection of bus ridership and performance information for fixed-route services, referred to in the transit industry as schedule checking.

One of the primary functions of the contract schedule checkers is to perform Federal Transit Administration (FTA)-required manual ridership tabulation to certify OCTA's Automatic Passenger Counting (APC) devices for use in National Transit Database (NTD) ridership reporting. Manual ridership tabulation is required for OCTA to continue to use APC data for NTD ridership reporting and remain eligible for federal funding. To perform this task, the contractor rides the bus and tabulates boardings at alightings at each stop, which are then compared to the APC system data and must be within a certain threshold for OCTA to continue to use the APC system for NTD reporting.

A second function performed by the contractor are special service checks. These are made at the request of OCTA Scheduling staff and are performance observations that supplement data collected through OCTA systems, such as on time performance (OTP) and boarding and alighting counts. For example, special service checks are done at the beginning of the school year to observe where students are boarding and alighting for school; information that would otherwise not be available through OCTA's farebox or APC systems, which collect ridership information. The contractor collects this type of information by riding the bus or standing at a bus stop and tallying the number of riders and documenting factors, such as weather or traffic congestion, that may impact service performance. Scheduling staff uses this information when developing bus schedules to ensure there is sufficient capacity on board buses for all passengers during school bell times.

Schedule checking services allow OCTA to maintain compliance with the FTA for use of APC data for NTD ridership reporting, and also allow for the collection of manual observations that Scheduling staff uses to supplement OTP and ridership data.

Procurement Approach

The original procurement was handled in accordance with OCTA's Board of Directors-approved policies and procedures for professional and technical services and was awarded on a competitive basis. The original agreement was awarded on January 14, 2019, in the amount of \$765,141, for an initial three-year term, and two, one-year option terms. This agreement has been previously amended as shown in Attachment A.

The proposed Amendment No. 2 is to exercise the second option term through January 31, 2024 and increase the maximum obligation in the amount of \$164,212, bringing the total contract value to \$929,353. The budget for this amendment is based on current and anticipated usage for this service.

The hourly rates will remain the same as originally negotiated for the second option term; therefore, they are deemed fair and reasonable.

Southland Car Counters has provided outstanding service to OCTA. Exercising the second option term will provide OCTA with continued fixed-route schedule checking services for system analysis to improve OC bus efficiency and customer experience.

Fiscal Impact

The project was approved in the OCTA Fiscal Year 2022-23 Budget, Operations Division, Scheduling and Bus Operations Support, Account No. 2128-7519-D4106-97S, and is funded through Local Transportation Funds.

Summary

Based on the information provided, staff recommends the Board of Directors authorize the Chief Executive Officer to negotiate and execute Amendment No. 2 to Agreement No. C-8-1850 with National Data and Surveying Services, Inc., doing business as Southland Car Counters, to exercise the second option term of the agreement, in the amount of \$164,212, to continue providing manual collection of bus ridership and performance information for fixed-route services, as known as schedule checking activities.

Attachment

- A. National Data and Surveying Services, Inc., doing business as Southland Car Counters, Agreement No. C-8-1850 Fact Sheet

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