



January 10, 2019

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Agreement for Bus Ridership Data Collection Services

Overview

The Orange County Transportation Authority utilizes professional data collection services to perform vital ridership data collection for benchmarking and reporting. Ridership data is one of the primary performance indicators utilized to evaluate service performance and is required by the Federal Transit Administration to be annually reported via the National Transit Database for the allocation of federal funds. Board of Directors' approval is requested to select a firm to assist in bus ridership data collection services.

Recommendations

- A. Approve the selection of National Data & Surveying Services, Inc., doing business as Southland Car Counters, as the firm to provide bus ridership data collection services.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-8-1850 between the Orange County Transportation Authority and National Data & Surveying Services, Inc., doing business as Southland Car Counters, in the amount of \$765,141, to provide bus ridership data collection services for a term of three years with two, one-year option terms.

Discussion

The Orange County Transportation Authority (OCTA) has contracted for ridership data collection, also known as schedule checking, since 2001. One of the primary functions of the contract schedule checkers is to perform required Federal Transit Administration (FTA), National Transit Database (NTD) checks. Random FTA NTD checks are required on a continual basis for OCTA to be eligible for federal funding. The various tasks provided include on-board bus ride checks, street corner checks, and NTD passenger boardings and alightings

by stop, on specific routes, using a random selection process as required by the FTA.

The collection of bus ridership and scheduling information is accomplished by the contractor observing and documenting bus passenger boarding and alighting, and the on-time performance and consistency with the printed scheduled. While onboard, the consultant also makes other observations of the service and documents areas for improvement to the operation.

The use of consultant services to perform the ridership and on-time performance collection and review services, also referred to as schedule checking, has proven to be an efficient and cost-effective way to perform these required reviews. Continued ridership data collection contract services will enable OCTA to perform FTA NTD schedule checks, as well as ride checks, point checks, and special service checks used to analyze and adjust OCTA's bus service to improve service efficiency and better serve OCTA's customers.

Procurement Approach

This procurement was handled in accordance with OCTA Board of Directors (Board)-approved procedures for professional and technical services. Award is recommended to the firm offering the most comprehensive overall proposal considering such factors as staffing and project organization, qualifications, prior experience with similar projects, work plan, as well as cost and price.

On August 7, 2018, Request for Proposals (RFP) 8-1850 was issued electronically on CAMM NET. The project was advertised in a newspaper of general circulation on August 7 and 13, 2018. A pre-proposal conference was held on August 16, 2018, and was attended by one firm. Two addenda were issued to post the pre-proposal conference registration sheets, provide responses to questions received, and make clarifications relative to the RFP.

On September 10, 2018, five proposals were received. An evaluation committee comprised of staff from Contracts Administration and Materials Management, Rail Operations, Scheduling and Bus Operations, and Transit Service Planning departments met to review proposals received for bus ridership data collection services.

The proposals were evaluated based on the following evaluation criteria and weights:

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|-------------------------------------|------------|
| • Qualifications of the Firm | 30 percent |
| • Staffing and Project Organization | 20 percent |
| • Work Plan | 25 percent |
| • Cost and Price | 25 percent |

Several factors were considered in developing the evaluation criteria. Qualifications of the firm was weighted at 30 percent as the proposing firm needs to have the experience, as well as the necessary resources, to be able to meet the immediate and long-term staffing requirements of this contract. Cost and price were assigned 25 percent to ensure a fair comparison of the proposed solutions for the total contract term, as well as ensuring that OCTA receives value for the services provided. Work plan was also weighted at 25 percent as the firm must be able to demonstrate its understanding of the project scope and provide the resources to perform the different types of checking service needed for this project. Staffing and project organization was weighted at 20 percent as it is critical for the firm to demonstrate it can provide the experienced and qualified individuals needed to achieve the requirements set forth in the scope of work. Based on the evaluation of the proposals, the evaluation committee interviewed all firms listed below in alphabetical order:

Firm and Location

Canete-Medina Consulting Group, Inc. (Canete-Medina)
Los Angeles, California

Innovative Data Acquisitions, LLC (IDAX)
Renton, Washington

National Data & Surveying Services, Inc., doing business as,
Southland Car Counters (Southland)
Orange, California

P.S. Elite Management (P.S. Elite)
Orange, California

Quality Counts, LLC (Quality Counts)
Concord, California

During the interview, each firm had an opportunity to present its qualifications and respond to the evaluation committee questions, which included specific clarification questions relating to its proposal. After considering the responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and adjusted individual scores. The rankings did not change.

Based on the evaluation of the written proposals, the firms' qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of Southland, to provide bus ridership data collection services. The following is a brief summary of the proposal evaluation results:

Qualifications of the Firm

Southland was established over 25 years ago and is located in Orange, California, with 70 full-time employees. Southland's proposal demonstrated relevant bus ridership data collection experience on multiple projects. Southland has performed numerous data collection services for clients throughout the United States, including California. Past projects include performing traffic counts for the City of Sacramento, citywide traffic data collection for the City of Santa Ana, collecting biennial data and on-call data collection for the City of Los Angeles, as well as data collection services for OCTA.

P.S. Elite was established in 2010 and is located in Orange, California. The principal has acted as project manager for every data collection project for OCTA while employed at Southland. The firm has provided a range of transit/traffic data collection and project management services, including bus and transit ridership studies and surveys, data collection, quality control, and data entry services.

Canete-Medina has been in business for more than 20 years with 25 regular employees and 200 seasonal employees. The firm has conducted several short-term data collection projects involving transportation surveys, on-board and platform station counts, fare models, and customer satisfaction surveys in the past for agencies such as Chicago Transit and Chicago's Pace Bus. The firm currently works as a consultant for Metra, a commuter railroad in Chicago, Illinois, for On/Off Ridership Counts projects.

IDAX and Quality Counts demonstrated limited experience performing similar work, however; the evaluation committee was interested in their proposed alternative solutions for bus ridership and data collections. IDAX started business in 2013 and has worked on projects from traffic counts to parking lot

projects and general field observations. Quality Counts' experience includes traffic data collections, Automatic Traffic Recorder data collection, pedestrian/bicycle counts, and a number of different surveys for various Transportation agencies.

Staffing and Project Organization

Southland proposed a project team with relevant experience in data collection as required for this project. Southland's proposed project organization plan demonstrated staff will be available to perform all required tasks throughout the duration of the contract.

P.S. Elite proposed an experienced project manager who has successfully completed project management for large scale data collection and data processing efforts for OCTA. The firm plans to hire data collection staff if awarded a contract.

Canete-Medina proposed experienced key personnel with various backgrounds that included successful completion of large project management projects, data collection, and data processing projects. The firm will hire data collection staff for this project if awarded a contract.

IDAX proposed 14 technicians to operate their proprietary geo-based collection software tool for tablets and phones, called Kapturrit. The IDAX staff has experience performing travel time studies, origin-destination studies, and parking. The firm lacks bus ridership and data collection experience; however, staff was interested in their alternative proposed solution.

Quality Count's staffing plan proposed an alternative solution that did not meet the staffing requirement of OCTA's scope of work for schedule checkers and to perform various data entry responsibilities. The firm provided staffing necessary for the video camera solution proposed by the firm.

Work Plan

Southland presented a work plan that addressed all the elements set forth in the scope of work. The proposed work plan identified administration and training practices, sequential tasks and assignments, quality control, and data collection methodology. The firm also discussed its approach and timeline for startup task completion. The firm demonstrated knowledge and understanding of OCTA's data collection requirements in the interview.

P.S. Elite discussed its approach to completing tasks, data collection training, and outlined sequentially the task's assignments. The firm also included a timeline for startup tasks completion and project schedule. The firm responded to all interview questions.

The work plan proposed by Canete-Medina met the requirements identified in the RFP. The firm discussed its approach to conducting bus ridership collection services and its ability to use OCTA's existing software systems and current ride-checking procedures. Interviews reinforced its teams' capabilities and understanding of the project requirements.

IDAX and Quality Counts proposed solutions outside the scope of work. IDAX proposed using a proprietary geo-based collection tool for tablets or mobile phones, and Quality Counts proposed a plan using OCTA's existing on-board cameras to complete the work.

Cost and Price

Pricing scores were based on a formula, which assigns the highest score to the lowest average billable hourly rates and scored the remaining average billable hourly rates based on their relation to the lowest. The RFP requested that firms propose not-to-exceed billable hourly rates for each position listed in the RFP throughout the contract term.

Southland's hourly rates were higher than P.S. Elite; however, Southland's qualifications and background as a firm, key personnel currently on staff, and approach to meeting the project's requirements were considered to outweigh the slightly higher pricing.

Procurement Summary

Based on the evaluation of the written proposals, the firm's qualifications, and information obtained from the interviews, the evaluation committee recommends award of the contract to Southland. Southland submitted a detailed technical proposal that was responsive to all requirements of the RFP.

Fiscal Impact

The project was included in the approved OCTA Fiscal Year 2018-19 Budget, Operations Division, Account 2128-7519-D4106-97S, and is funded through local transportation funds.

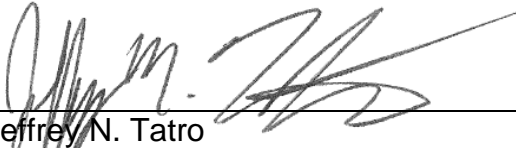
Summary

Based on the information provided, staff recommends the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-8-1850, with National Data & Surveying Services, Inc., doing business as Southland Car Counters, in the amount of \$765,141, to provide bus ridership data collection services for a three-year initial term with two, one-year option terms.

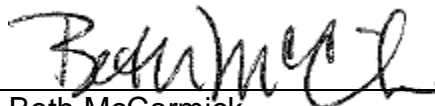
Attachments

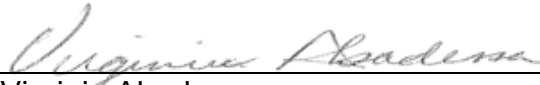
- A. Review of Proposals, RFP 8-1850 Bus Ridership Data Collection
- B. Proposal Evaluation Criteria Matrix, RFP 8-1850 Bus Ridership Data Collection
- C. Contract History for the Past Two Years, RFP 8-1850 Bus Ridership Data Collection

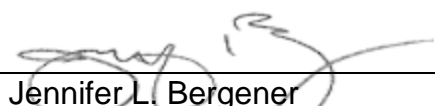
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