



January 25, 2013
Addendum No. 1
to

**REQUEST FOR QUALIFICATIONS
Transit Passenger Surveying Services**

dated December 18, 2012

Dear Consultant:

This letter is Addendum No. 1 to the Request for Qualifications for Transit Passenger Surveying Services dated December 18, 2012 (“RFQ”). Where text is revised, deleted text is shown in strike-through format; added text is *italicized*. The RFQ is revised as follows:

<u>Addendum Item</u>	<u>Reference</u>	<u>Change</u>
1.	<u>RFQ, Letter of Invitation, Statement of Qualifications Due Date</u> , page 1	Proposers must submit an original and eight <i>six (6)</i> copies of their Statement of Qualifications by 4:00 p.m. Friday , <i>Monday February 4, 2013</i> .
2.	<u>RFQ, Letter of Invitation, Consultant Selection Timetable*</u> , page 5	<u>February 4, 2013, at 4:00 p.m.</u> <u>Closing date/time for receipt of Statement of Qualifications</u>
3.	<u>RFQ, Section V. General Conditions, subsection F. Public Records</u> , page 19	Proposals will remain confidential until the MTC Executive Director has authorized award. <i>Other than proprietary information or other information exempt from disclosure by law, the content of the SOQ submitted to MTC will be made available for inspection consistent with its policy regarding Public Records Act requests.</i> <i>If the Proposer believes any communication contains trade secrets or other proprietary information that the Proposer believes would cause substantial injury to the Proposer’s competitive position if disclosed, the Proposer shall require that MTC withhold from disclosure such proprietary materials by marking each page containing propriety information as confidential and shall include the following notice at the</i>

Adrienne J. Tissier, Chair
San Mateo County

Amy Rein Worth, Vice Chair
Cities of Contra Costa County

Tom Azumbrado
U.S. Department of Housing
and Urban Development

Tom Bates
Cities of Alameda County

David Campos
City and County of San Francisco

Dave Cortese
Santa Clara County

Bill Dodd
Napa County and Cities

Dorene M. Giacomini
U.S. Department of Transportation

Federal D. Glover
Contra Costa County

Mark Green
Association of Bay Area Governments

Scott Haggerty
Alameda County

Anne W. Halsted
San Francisco Bay Conservation
and Development Commission

Steve Kinsey
Marin County and Cities

Sam Licardo
Cities of Santa Clara County

Jake Mackenzie
Sonoma County and Cities

Kevin Mullin
Cities of San Mateo County

Bijan Sartipi
State Business, Transportation
and Housing Agency

James P. Spering
Solano County and Cities

Scott Wiener
San Francisco Mayor’s Appointee

Steve Heminger
Executive Director

Ann Flemer
Deputy Executive Director, Policy

Andrew B. Fremier
Deputy Executive Director, Operations

		<p><i>front of its SOQ:</i></p> <p><i>“The data on the following pages of this SOQ, marked along the right margin with a vertical line, contain technical or financial information which are trade secrets and/or which, if disclosed, would cause substantial injury to the Proposer’s competitive position. The Proposer requests that such data be used for review by MTC only, but understands that exemption from disclosure will be limited by MTC’s obligations under the California Public Records Act. If a contract is awarded to the Proposer submitting this SOQ, MTC shall have the right to use or disclose the data, unless otherwise provided by law. [List pages]”</i></p> <p><i>Failure to include this notice with relevant page numbers shall render any “confidential/proprietary” markings inadequate. Individual pages shall accordingly not be treated confidentially. Any language purporting to render the entire SOQ confidential or proprietary will be regarded as ineffective and will be disregarded. In addition, the Proposer may not designate any required SOQ Forms or the cost proposal as confidential.</i></p> <p><i>In the event properly marked data is requested pursuant to the California Public Records Act, the Proposer will be advised of the request. If the SOQ requests that MTC withhold such data from disclosure and MTC complies with the Proposer’s request, the Proposer shall assume all responsibility for any challenges resulting from the non-disclosure; indemnify MTC and hold it harmless from and against all damages (including but not limited to attorneys’ fees that may be awarded to the party requesting such Proposer information) and pay any and all costs and expenses relating to the withholding of the Proposer information.</i></p> <p><i>If the Proposer does not request that MTC</i></p>
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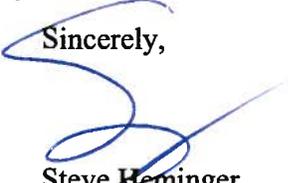
		<i>withhold information marked as confidential and requested under the California Public Records Act, MTC shall have no obligation to withhold the information from disclosure, and the Proposer shall not have a right to make a claim or maintain any legal action against MTC or its Commissioners, officers, employees, or agents in connection with such disclosure.</i>
4.	RFQ, APPENDIX A, SCOPE OF WORK, TASKS, Task 1: Perform Transit Passenger Surveys, page 14	MTC seeks to collect transit passenger data for the entire San Francisco Bay Area. <i>The surveys will be performed transit agency by transit agency. Within a given agency, the data should adequately represent both the spatial travel patterns and demographics of the system's customers. To do this, survey records are typically weighted, often times with data collected in the field while the surveying is being administered. Collecting on/off counts may be considered as a method for expanding surveying.</i>
5.	RFQ, APPENDIX B-1, INSURANCE REQUIREMENTS, page 18, <u>Errors and Omissions Professional Liability Insurance</u>	<u>Errors and Omissions Professional Liability Insurance</u> in an amount no less than \$2,000,000 1,000,000.
6.	RFQ, APPENDIX B-1, INSURANCE REQUIREMENTS, page 18, <u>Umbrella Insurance</u>	<u>Umbrella Insurance</u> in the amount of \$5,000,000 1,000,000 providing excess limits over Employer's Liability, Automobile Liability, and Commercial General Liability Insurance.

The remaining provisions of the RFQ remain unchanged. In the event of a conflict between this Addendum and the previous version(s), this Addendum takes precedence.

Questions and Answers regarding this RFQ are enclosed with this Addendum.

Any questions concerning this addendum to the RFQ should be directed to Kenneth Folan, Project Manager, at (510) 817-5804 or kfolan@mtc.ca.gov.

Sincerely,


Steve Heminger
Executive Director

SH:KF

**REQUEST FOR QUALIFICATIONS (RFQ)
TRANSIT PASSENGER SURVEYING SERVICES
dated December 18, 2012**

Proposers' Conference and Submitted Questions and Answers

January 25, 2013

Q1: What firm is currently under contract with MTC to perform transit passenger surveying services?

A1: Dikita Enterprises and Redhill Group.

Q2: To meet minimum requirements, does the survey work need to be conducted aboard transit vehicles? Meaning, could it instead be done at transit hubs

A2: One goal of the data collection is to understand the spatial patterns of transit riders. If the proposer believes it's possible to represent the spatial patterns of a transit system's customers by surveying at transit hubs, we would be open to such a proposal.

Q3: While performing data aggregation, should contractor make changes to data based on transit system route changes? Meaning, if route 1 and route 2 are surveyed in 2011 and, in 2012, routes 1 and 2 are combined to form route 3, will the contractor be asked to, retrospectively, update the 2011 data to reflect the 2012 service?

A3: No. Operators will be surveyed based on current operations, and the data will be represented as such.

Q4: Specific to task 2, can the minimum qualification related to weighting and aggregating data be met through work at specific agencies?

A4: Yes. We do not expect proposers to have experience with the specific task of combining data sets across multiple transit operators. We do expect proposers to have experience weighting transit surveys and to demonstrate that they have the skills and experience necessary to successfully perform the additional work

Q5: Will the specific data format for transmittal to MTC be identified?

A5: We will work with consultants on the final data format, but we're not looking for a custom "front-end" software development. A CSV format for the data might be sufficient, though we might also ask for the metadata in a SAS-friendly format.

Q6: Is identification of the DBEs required in the proposal?

A6: While SOQs may include subcontractors, the forms required for DBE participation are not required until a DBE goal is calculated at the time task orders are issued. That a DBE goal will be set at the time of task order should inform your selection of subcontractors.

Q7: Would you consider airline passengers "transit passengers" or not?

A7: No.

Q8: Would a proposer submitting on one of the Tasks (Task 1 or Task 2) in Appendix A be expected to be able to provide all of the services itemized under that task?

A8: If a proposer so excelled at a particular aspect of Task 1, for example, that MTC determined it would be in MTC's best interest in hire said proposer for one aspect of Task 1 and then form a team with another proposer, MTC would consider hiring a proposer for items within a task.

Q9: Since our final reports that we submit have client information as well as our firm's proprietary methodology, would we be able to redact a document prior to submitting it with our proposal?

A9: Please see RFQ Addendum No. 1, dated January 25, 2013, item 1.

Q10: Does every route from every agency need to be sampled. If not, which transit systems will be needed for sampling?

A10: Please see Addendum No. 1, item 2. MTC will consider any sampling plan that accomplishes this.

Q11: Are passenger on/off counts a requirement and if so, would they need to be at the route/trip/direction/pattern/time of day level or at the stop level?

A11: Please see RFQ Addendum No. 1, dated January 25, 2013, item 2.

Q12: Regarding Task 2 (combining data from multiple transit operators), do you have an estimate of the size of the datasets that would be combined? Do you have an estimate of the size of the eventual combined dataset, in terms of total survey respondents? What type of file/program would you like used to display/query the final database?

A12: The eventual (weighted, expanded) combined dataset will represent the Bay Area's approximately 1.6 million transit riders. Since the data may be coming from different sources, an exact estimate of unweighted records is difficult, but is likely to be in the range of 5-20 percent of the weighted total, or 80,000 to 320,000 records. MTC will work with consultants on the final data format, but does not expect a custom "front-end" software development. A CSV format for the data may be sufficient, though MTC may also ask for the metadata in an SAS-friendly format.

Q13: Is there any possibility of using data collected from the Clipper Card program for surveying or panel building? In particular, would it be possible to access Clipper Card holder names/telephone numbers/email addresses for the purposes of conducting a survey?

A13: We don't have access to this information and will not be using Clipper Card data for surveying.

Q14: As we think about innovative methods, it would be helpful to know more about how you have conducted recent projects. Can you give any information about what your standard process has been for transit intercept interviewing in the past? Interviewer-administered versus self-completed by respondent? Pencil & paper vs. tablet or other electronic means? On-board versus take-home and return? Self-selection by respondents versus random selection method by on-board interviewers?

A14: The last fully regional survey was conducted in 2006 (available here: http://mtc.ca.gov/maps_and_data/datamart/survey/2006_transit.htm) and was a pencil and paper survey. As part of the Transit Sustainability Project, in 2012 MTC surveyed five transit operators using a hybrid approach adopted from Los Angeles MTA that was discussed at the Proposer's Conference: transit passengers were given a short, one-page survey that asked origin and destination trip purposes and also asked for a phone number and the best time to contact the respondent. The consultant then followed up with a computer-assisted telephone interview (CATI) that asked for demographic information and details of the passenger's trip, including

origin, destination, workplace, home, and school locations. All boarding passengers (not random or self-selected methods) were surveyed until sample quotas were met.

Q15: Are you able to provide us with or point us to any of the recent intercept research you have completed similar to this work? Information about methodologies used would be particularly helpful.

A15: See the answer to previous question in regards to the methodology MTC has recently used for surveying. Beyond that, in conversation with FTA staff and others, MTC understands that in-person tablet PC interviews have been completed in Atlanta, Honolulu, Denver, and other locations. MTC expects that consultants will bring experience and insight into what approaches might be best applied for MTC needs.

Q16: Do you have a list of all of the transit systems that would be participating in the research? Are there any specific systems that will not be participating?

A16: It is MTC's intent to survey all operators that claim Transportation Development Act (TDA) funds. A comprehensive list can be found here, in the 2010-2011 Statistical Summary of Bay Area Transit Operators: <http://www.mtc.ca.gov/library/statsum/statsum.htm>.

For this effort, to date MTC has surveyed AC Transit, County Connection, Sonoma County Transit, Santa Rosa CityBus, and Petaluma Transit. MTC will likely survey a few additional operators this spring as well under existing contracts. MTC does not have any formal agreements with operators to survey them, but rather relies on collaboration. Therefore, providing a final list of participating operators is not possible at this time.

Q17: Will MTC select multiple consultants for each task, i.e., Task 1 and Task 2?

A17: The goal of this RFQ is to develop additional capacity to survey the region's transit passengers. Toward that goal, MTC has not yet made a decision about how many consultants it will hire for each task. However, it is likely that the evaluation panel will recommend two or three firms for each Task 1 and Task 2.

Q18: Can a consultant be a subconsultant on one team and prime consultant on another team?

A18: Yes. We will be evaluating the strength of each team for our project goals.

Q19: Is the purpose of combining data from multiple agencies into a single dataset for a comparative analysis perspective or is it for travel demand modeling?

A19: There are many goals for this task. Data combined into the single dataset will be used for travel demand modeling and also for regional analysis of transit ridership, including Title VI equity analyses.

Q20: Could you provide just a single figure of average weekday boarding for the whole region?

A20: There are approximately between 1.5 and 1.6 million boardings in the Bay Area on an average weekday. Boarding information by operator can be found on the MTC website: <http://www.mtc.ca.gov/library/statsum/statsum.htm>. There are approximately between 1.5 and 1.6 million boardings in the Bay Area on an average weekday. Boarding information by operator can be found on the MTC website: <http://www.mtc.ca.gov/library/statsum/statsum.htm>.

Q21: Will the work under this contract replace similar work being performed under the Sustainability contract?

A21: This work will continue surveying work that was begun in the Transit Sustainability Project. If by “replace” is meant to reproduce previous work completed, then no. The goal is to build on surveying work already completed (the five transit operators identified in Question 16, above), while expanding capacity for surveying the remaining operators in the region.

Q22: Since this is a multiple year contract, is it OK to submit hourly rates for each year?

A22: Yes, but please provide the basis (e.g., inflation) for year-over-year increases in hourly rates.

Q23: Is it OK to submit hourly rates for staff types (e.g. Surveyor) rather than specific individuals?

A23: MTC would like the hourly rates for key personnel such as project managers, supervisors, etc. to include specific individuals. Rates for categories of other personnel are acceptable, for example, surveyors, phone operator personnel, etc.

Q24: Will there be different types of surveys involved (customer satisfaction, OD, boarding counts, etc.) or will the consultant just collect the same data from different agencies?

A24: Likely the latter – i.e. one survey administered to each of the different agencies. MTC’s current data needs require trip and demographic characteristics of riders, including origin and destination locations of trips. There will likely be a few customer service questions (which might vary by operator) asked as part of the survey, but the focus will be on trips and demographic data.

Q25: Other than the experience tables, is there any maximum page limit on the SOQ?

A25: No, however, please give consideration to the evaluation panel’s time in preparing your SOQ, and note that the experience reflected in the tables is of particular significance.

Q26: Are hourly ranges per staff type acceptable or must the rates be fixed?

A26: Hourly rates are included in the evaluation criteria, and if ranges, rather than fixed rates, are provided this may affect evaluation.

Q27: For reimbursable expenses, will invoices need receipts for every expense on a cost plus fixed fee contract?

A27: MTC expects to issue contracts under this RFQ on as task order basis as either deliverables or time and materials based, not cost plus fixed fee.