



**Item #13-1-4
Action**

Strategic Planning Committee

December 20, 2012

Connect Card Transit On-Board Passenger Survey Award

Issue: The Transit Coordinating Committee and Connect Card Program Management Committee, representing a Consortium of seven transit operators and SACOG, is recommending that a contract for on-board transit surveys for all seven systems be awarded to Transit Marketing, LLC.

Recommendation: The Strategic Planning Committee recommends that the Board award the Connect Card transit survey contract to Transit Marketing, LLC. and delegate authority to the Chief Executive Officer to negotiate and execute a final contract in an amount not to exceed \$350,000.

Discussion: SACOG staff and the Transit Coordinating Committee (TCC) recommend award Transit Marketing, LLC up to \$350,000 to conduct on-board transit surveys both pre- and post-implementation of the Connect Card project. The on-board passenger surveys will provide a tool for guiding and evaluating the implementation of the Connect Card, assisting with future fare policy changes, addressing Title VI reporting requirements, and providing each agency with market research data (demographics, usage characteristics, and satisfaction data) to guide their own additional planning, marketing and operations efforts. The survey project is funded separately from the Connect Card project budget and falls within the adopted Overall Work Program (OWP) budget total for this work.

Proposals: SACOG released a Request for Proposals (RFP) on October 1, 2012 that was advertised to companies local and nation-wide. On-board transit surveying is a unique, niche field and SACOG received four proposals from the following companies: EMC Research (based in Oakland, CA), NuStats Research (based in Austin, TX), SDC Research (based in Farmington, UT), and Transit Marketing, LLC (based in Tucson, AZ). All contractors proposed hiring local residents to conduct on-board transit surveys.

Evaluation: The proposals were reviewed and evaluated by an evaluation committee made up of staff from Sacramento Regional Transit and SACOG. SDC proposal was determined to be unqualified, and in November, the three remaining bidders were interviewed. The interviews were followed by formal proposal scoring. The proposal evaluation committee unanimously determined that Transit Marketing's proposal offers the best value for the Connect Card on-board transit survey project.

Recommendation: Transit Marketing is recommended to be awarded a contract to conduct two separate on-board transit surveys, pre- and post-Connect Card implementation, and will be responsible for all aspects of the survey planning, data collection and analysis effort. The Transit Marketing team has conducted similar market research studies for public transit agencies throughout the country, and has extensive experience in the local area, conducting an on-board survey for Sacramento Regional Transit in 2006, and working with El Dorado Transit, Yuba-Sutter Transit and e-tran on various projects, as well as with SACOG and the Consortium on the Connect Card branding effort. Transit Marketing specializes in this field and proposes to provide the Consortium with both top quality data collection services and a level of analysis and presentation that go well beyond the norm in the transit industry.

EMC is a public issue opinion research, marketing and strategy consulting agency and has experience working in the Bay Area and with SMUD. Although the firm proposed a significantly lower cost

(\$273,098) than the other two competitive firms, EMC proposed an approach that does not adequately satisfy the needs of the project. NuStats is a full service survey research consultancy firm whose experience in the Sacramento region includes conducting SACOG's 2006 regional on-board transit survey, and using a subcontractor that participated in SACOG's universal fare card feasibility study. This firm's proposal (\$339,606) did not include nearly the customer service, project management, overall organization, data analysis, or data presentation offered by Transit Marketing. Overall, both EMC and Nustats have very limited experience in the Sacramento area, with the Connect Card project, and do not specialize in this unique, niche industry.

Survey Project: The first survey is scheduled to be conducted in the spring of 2013 (prior to Connect Card implementation) and the second survey in the spring of 2014 (after the introduction). Each survey will be comprehensive in nature, including all participating bus and light rail lines throughout the region, and data will be collected from approximately 15,000 passengers during each of the two phases.

Project Background: The Connect Card is a regional electronic transit fare system that will allow patrons to conveniently purchase fares in advance, seamlessly pay onboard bus fare and light rail fare at stations, and easily transfer between transit systems using one smart card. The Connect Card is anticipated to increase transit ridership across the region. The implementation of the Connect Card is being completed through a Consortium that includes SACOG and seven different transit operators (Sacramento Regional Transit District, El Dorado Transit, Elk Grove Transit, Folsom Stage Lines, Roseville Transit, Yolo County Transportation District, and Yuba-Sutter Transit).

The following documents are attached: Transit Marketing, LLC company description (Attachment A); a summary of the procurement process (Attachment B); the on-board transit survey project description (Attachment C); the project budget (Attachment D); and work schedule (Attachment E). The final contract documents are subject to further refinements.

Approved by:

Mike McKeever
Chief Executive Officer

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Attachments

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