

PROCUREMENT SUMMARY

2023 ON-BOARD SYSTEM-WIDE ORIGIN-DESTINATION SURVEY/PS91223-2000

1.	Contract Number: PS91223-2000	
2.	Recommended Vendor: ETC Institute	
3.	Type of Procurement (check one): <input type="checkbox"/> IFB <input checked="" type="checkbox"/> RFP <input type="checkbox"/> RFP-A&E <input type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order	
4.	Procurement Dates:	
	A. Issued: November 17, 2022	
	B. Advertised/Publicized: November 17, 2022	
	C. Pre-Proposal Conference: November 30, 2022	
	D. Proposals Due: December 27, 2022	
	E. Pre-Qualification Completed: In Process	
	F. Conflict of Interest Form Submitted to Ethics: January 3, 2023	
	G. Protest Period End Date: April 25, 2023	
5.	Solicitations Picked up/Downloaded: 25	Bids/Proposals Received: 2
6.	Contract Administrator: Yamil Ramirez Roman	Telephone Number: (213) 922-1064
7.	Project Manager: John Stesney	Telephone Number: (213) 922-6893

A. Procurement Background

This Board Action is to approve Contract No. PS91223-2000 issued in support of the collection of information on origin-destinations, trip purposes, and demographics of Metro's customers. This data will enable Metro to understand the existing customer travel patterns and demographics. The data will also enable the creation of observed transit trip tables for use in calibrating and validating the Metro travel forecasting model. Board approval of contract awards are subject to resolution of any properly submitted protest(s).

The Request for Proposals (RFP) was issued in accordance with Metro's Acquisition Policy and the contract type is a firm fixed price. The RFP was issued with a Small Business Enterprise (SBE) goal of 30 percent and a Disabled Veteran Business Enterprise (DVBE) goal of 3 percent. It was also subject to the Local Small Business Enterprise Preference program, which awards a bonus of 5 preference points for the utilization of local small business firms. This solicitation is a re-issue after an initial solicitation (RFP No. PS91223) under the Small Business Enterprise Set-Aside Program failed to produce any qualified, responsive proposals.

Two (2) amendments were issued during the solicitation phase of this RFP:

- Amendment No. 1, issued on November 28, 2022 clarified the link to Metro's Small Business Query website;
- Amendment No. 2, issued on December 9, 2022 revised Exhibit A – Scope of Services of the RFP to include an updated Milestone Schedule for the project.

The Amendment also updated Exhibit 7 – List of Completed Contracts, increasing the time requirement from 5 years to 7 years.

A total of 25 firms downloaded the RFP and were included in the plan holder's list. A virtual pre-proposal conference was held on November 30, 2022, and was attended by 6 participants representing 4 firms. There were 15 questions asked, and responses were released prior to the proposal due date. Two (2) proposals were received on December 27, 2022 from the following firms listed below in alphabetical order:

1. Dikita Enterprises, Inc.
2. ETC Institute

B. Evaluation of Proposals

A Proposal Evaluation Team (PET) consisting of staff from Metro's Countywide Planning & Development Department was convened and conducted a comprehensive technical evaluation of the proposals received.

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

- | | |
|--|------------|
| • Experience and Qualifications of the Team and Proposed Personnel | 40 percent |
| • Work Plan/Project Approach | 40 percent |
| • Cost | 20 percent |
| • Local Small Business Enterprise (LSBE) Preference Program | 5 percent |

The evaluation criteria are appropriate and consistent with criteria developed for other, similar on-board survey services procurements. Several factors were considered when developing these weights, giving the greatest importance to Experience and Qualifications of the Team and Proposed Personnel as well as Work Plan/Project Approach.

During the period of January 9, 2023 to January 17, 2023, the PET independently evaluated and scored the technical proposals. On February 2, 2023 both firms were invited for oral presentations which provided them the opportunity to present their qualifications, and to respond to questions from the PET. Following the oral presentations, the PET submitted final scores based on both the written proposals and input received during oral presentations. On February 13, 2023, the PET determined ETC Institute to be the highest ranked proposer.

Qualifications Summary of Firms:

ETC Institute

ETC Institute, Inc. is a Kansas-based market research firm that works to help local governmental organizations gather data from residents to enhance community planning. The firm demonstrated experience working with public agencies across the United States to administer on-board surveys. ETC has 40 years of experience and has administered surveys in over 1,000 cities since 2010.

ETC demonstrated their knowledge and competence in the technical areas as required in the scope of services and the proposal showcased their capabilities to administer the 2023 On-Board System-Wide Origin-Destination Survey.

ETC's proposal demonstrated extensive experience in fielding origin-destination surveys as well as in-depth knowledge of the Los Angeles County service area. The proposal also highlighted their years of experience working with their subcontractor, Anik Inc. in providing transit surveys. The organizational chart clearly identified the structure and task responsibilities of each team member.

Dikita Enterprises, Inc.

Dikita Enterprises, Inc. (Dikita) is an Engineering and Consulting firm headquartered in Dallas, TX and has been the primary data collectors for Dallas Area Rapid Transit (DART) over the last 30 years. The company's president designed one of the transportation industry's first software applications to effectively capture boarding and alighting data via handheld computers. Dikita put together a team comprised of skilled transit modelers, transit data collection specialists, and software experts to address all key tasks.

Dikita's proposal demonstrated a good understanding of the human dynamics of interviewing respondents and the software used for the surveys would ensure the necessary rigor for data quality. Dikita's proposal did not demonstrate sufficient experience fielding origin-destination surveys and, while it identified a number of issues with this type of project, they did not propose possible appropriate solutions.

A summary of the PET scores is provided below:

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	ETC Institute				
3	Experience and Qualifications of the Team and Proposed Personnel	92.50	40.00%	37.00	
4	Work Plan/Project Approach	82.50	40.00%	33.00	
5	Cost	75.68	20.00%	15.14	
6	Local Small Business Enterprise (LSBE) Preference Program (Bonus 5%)	100.00	5.00%	5.00	
7	Total		105.00%	90.14	1
8	Dikita Enterprises, Inc.				
9	Experience and Qualifications of the Team and Proposed Personnel	73.33	40.00%	29.33	
10	Work Plan/Project Approach	76.68	40.00%	30.67	
11	Cost	100.00	20.00%	20.00	
12	Local Small Business Enterprise (LSBE) Preference Program (Bonus 5%)	100.00	5.00%	5.00	
13	Total		105.00%	85.00	2

C. Price Analysis

The recommended price has been determined to be fair and reasonable based upon an independent cost estimate (ICE), cost analysis, technical analysis, and negotiations.

Metro staff successfully negotiated a cost savings of \$2,154 from reductions in the proposed overhead and profit.

	Proposer Name	Proposal Amount	Metro ICE	Negotiated Amount
1.	ETC Institute	\$1,497,334	\$1,408,085	\$1,495,180
2.	Dikita Enterprises, Inc.	\$1,133,247		

The variance between the final negotiated price and the ICE is due to the level of effort being underestimated for the following tasks: Task 4 Data Processing and Analysis, Task 5 Provide Data Set, and Task 6 Final Report. The increased level of effort was determined acceptable.

D. Background on Recommended Contractor

ETC Institute (ETC) is a market research firm with experience fielding over 1,000,000 on-board origin-destination surveys for transit agencies in 41 U.S. states. ETC uses a proprietary survey application that was developed in-house specifically to ensure the highest quality data is collected. The proposed project principal, project manager, programming manager, data manager, and assistant project manager have worked together in their same roles on origin-destination surveys since 2015.

Subcontractor Anik Inc. is a Metro certified SBE national staffing firm based in Los Angeles that has served as a subcontractor to ETC since 2019 and have provided staff for more than twenty survey projects. Subcontractor Sam Scully Staffing is a DVBE staffing firm based in Los Angeles and will provide temporary staff to field the surveys. Subcontractor Insight Transportation Consulting is an SBE firm that will provide ETC with modeling, expansion and analysis support.

ETC has worked on several Metro surveys such as the 2021 Customer Experience Survey, 2020 Telephone Survey and Crenshaw Line Before Intercept Survey, the 2022-23 Customer Satisfaction Surveys, and has performed satisfactorily.