

PROCUREMENT SUMMARY

CUSTOMER EXPERIENCE RESEARCH SERVICES BENCH/ PS43815000 - PS43815006

1.	Contract Number: PS43815000 through PS43815006	
2.	Recommended Vendors: See Attachment B	
3.	Type of Procurement (check one): ☐ IFB ☒ RFIQ ☐ RFP-A&E ☐ Non-Competitive ☐ Modification ☐ Task Order	
4.	Procurement Dates:	
	A. Issued: October 6, 2022	
	B. Advertised/Publicized: October 6, 2022	
	C. Pre-Proposal Conference: October 13, 2022	
	D. Proposals Due: November 7, 2022	
	E. Pre-Qualification Completed: January 1, 2023	
	F. Conflict of Interest Form Submitted to Ethics: November 22, 2022	
	G. Protest Period End Date: February 21, 2023	
5.	Solicitations Picked Up/Downloaded: 45	Bids/Proposals Received: 21
6.	Contract Administrator: Shannon Thoene	Telephone Number: (213) 922-2790
7.	Project Manager: Jeff Boberg	Telephone Number: (213) 922-7659

A. Procurement Background

This Board Action is to establish multiple-award customer experience research services bench contracts for a five-year term inclusive of a three-year base term and two, one-year option terms. The contracts shall be effective March 1, 2023, with a cumulative total amount not-to-exceed \$12,082,292. The Bench is intended to provide market research services to support bringing the voice of the customer into decision-making and to drive Customer Experience (CX) improvements. Board approval of contract award is subject to resolution of any properly submitted protest.

Customer experience research services shall be performed on an “as-needed” basis and work shall be authorized through the issuance of task orders. Task Orders with a total value of \$100,000 and below, shall be issued on a rotational, sequential basis while task orders with a total value over \$100,000 shall be competed among the bench firms within the appropriate discipline.

On October 6, 2022, RFIQ No. PS43815 was issued as a competitive procurement in accordance with Metro’s Acquisition Policy and the contract type is task order based.

A virtual pre-proposal conference was held on October 13, 2022. Eleven questions were received, and Metro provided responses prior to the proposal due date.

Two amendments were issued during the solicitation phase of this RFIQ:

- Amendment No. 1, issued on October 26, 2022, revised the submittal requirements and evaluation criteria.
- Amendment No. 2, issued on October 31, 2022, incorporated the Diversity and Economic Opportunity Department Compliance Manuals for the SBE/DVBE and Set-Aside programs as a contract exhibit.

Forty-five firms downloaded the RFIQ and were included on Metro's planholders' list. A total of 21 proposals were received from seven firms by the due date of November 7, 2022, and are listed below in alphabetical order:

Discipline 1: Intercept Survey

1. ETC Institute
2. Hispanispace, LLC dba ThinkNow Research
3. Maroon Society, Inc.
4. Redhill Group, Inc.

Discipline 2: Online and Telephone Survey

1. Barrios and Associates, LLC dba Communications Lab
2. EMC Research, Inc.
3. ETC Institute
4. Hispanispace, LLC dba ThinkNow Research
5. Maroon Society, Inc.
6. Quantum Market Research, Inc.
7. Redhill Group, Inc.

Discipline 3: Qualitative Research

1. Barrios and Associates, LLC dba Communications Lab
2. EMC Research, Inc.
3. Hispanispace, LLC dba ThinkNow Research
4. Maroon Society, Inc.
5. Quantum Market Research, Inc.
6. Redhill Group, Inc.

Discipline 4: User Experience Testing

1. Quantum Market Research, Inc.
2. Redhill Group, Inc.

Discipline 5: General Research Support

1. Maroon Society, Inc.
2. Redhill Group, Inc.

B. Evaluation of Proposals

Five Proposal Evaluation Teams (PETs) were convened and conducted a comprehensive technical evaluation of the proposals received for each of the five disciplines. The PETs consisted of staff from Customer Experience, Technical Services, and Data Analysis, Long Range Transportation Plan, Digital Communication Administration Marketing, Transportation Planning, and TDM Policy and Regional Shared Mobility. The proposals were evaluated based on the following evaluation criteria:

Phase I Evaluation – Minimum Qualification Review: This is a pass/fail criteria. The criteria for all five disciplines focused on the experience of the Prime Contractor and/or team in providing research services, including but not limited to:

1. Development of research plans;
2. Questionnaire/discussion guide development;
3. Documentation of research methods and datasets;
4. Preparing technical memorandums, reports, and presentations; and
5. Provision and administration of incentives to incentivize participation in research.

From November 9, 2022 through November 15, 2022, the PETs met to review the evaluation criteria package, process confidentiality and conflict of interest forms, and take receipt of the proposals to initiate the Phase I evaluation.

On November 21, 2022, the PETs reconvened and determined that all proposals received met the minimum qualification requirements and proceeded with Phase II - Technical Evaluation based on the following criteria and weights:

- | | |
|--|-----------|
| • Qualifications of the Firm and Team | 30 Points |
| • Project Manager and Key Staff's Qualifications and Availability | 50 Points |
| • Understanding the Scope of Services and Management Plan and Approach | 20 Points |

The evaluation criteria are appropriate and consistent with criteria developed for similar customer experience research services. Several factors were considered in developing these weights, giving the greatest importance to the qualifications and availability of the project manager and key staff.

Phase II evaluations were conducted from November 16, 2022, through January 3, 2023. At the conclusion of evaluations, the PETs determined the following:

Discipline 1 - Intercept Survey: All four firms met the competitive range and were determined to be responsive, responsible, and qualified to perform the services based on the RFIQ's requirements. The firms are listed below in alphabetical order:

1. ETC Institute
2. Hispanispace, LLC dba ThinkNow Research
3. Maroon Society, Inc.
4. Redhill Group, Inc.

Discipline 2 - Online and Telephone Survey : Of the seven proposals received, two firms were outside of the competitive range and were not included for further consideration. The five (5) firms within the competitive range are listed below in alphabetical order:

1. Barrios and Associates, LLC dba Communications Lab
2. EMC Research, Inc.
3. Maroon Society, Inc.
4. Quantum Market Research, Inc.
5. Redhill Group, Inc.

Discipline 3 - Qualitative Research: All six firms met the competitive range and were determined to be responsive, responsible, and qualified to perform the services based on the RFIQ's requirements. The firms are listed below in alphabetical order:

1. Barrios and Associates, LLC dba Communications Lab
2. EMC Research, Inc.
3. Hispanispace, LLC dba ThinkNow Research
4. Maroon Society, Inc.
5. Quantum Market Research, Inc.
6. Redhill Group, Inc.

Discipline 4 - User Experience Testing: Of the two proposals received, only the Redhill Group, Inc. met the competitive range and was determined to be responsive, responsible, and qualified to perform the services based on the RFIQ's requirements.

Discipline 5 - General Research Support: Both proposers met the competitive range and were determined to be responsive, responsible, and qualified to perform the services based on the RFIQ's requirements. The firms are listed below in alphabetical order:

1. Maroon Society, Inc.
2. Redhill Group, Inc.

C. Cost/Price Analysis

Each proposer submitted fully burdened hourly rates for labor classifications necessary to perform customer experience research services. The rates have been determined to be fair and reasonable based on price analysis, cost analysis, technical evaluation, and fact-finding.

Work for this Bench Contract will be authorized through the issuance of separate task orders. Each task order will contain a specific Scope of Services and will be issued either on a rotation basis (for task orders with a total value of \$100,000 and below) or will be competed among the firms on the bench within the appropriate discipline (for task orders with a total value over \$100,000).

D. Background on Recommended Contractors

Barrios and Associates, LLC dba Communications Lab

Barrios and Associates, LLC dba Communications Lab (Communications Lab), established in 2013, is headquartered in Orange County, CA. It is a full-service agency that provides focused communication, consulting services, strategic planning, crisis communications, media relations, and community outreach services. Communication Lab's clients include the Orange County Transportation Authority, Transportation Corridor Agency (The Toll Roads), San Bernardino County Transportation Authority, City of Lake Forest, and Santa Margarita Water District.

Communications Lab has been providing community outreach services to Metro since 2018 and performance has been satisfactory.

Communications Lab is a Metro-certified small business enterprise.

EMC Research, Inc.

EMC Research, Inc. (EMC), headquartered in Seattle, Washington, is a full-service opinion research firm established in 1989. Its expertise includes branding and positioning; data analytics; political polling; customer satisfaction; ad testing; and social and behavioral studies. It serves a diverse range of public and private sector clients which include the California Department of Transportation, San Francisco Bay Area Metropolitan Transportation Commission, Alameda-Contra Costa Transit District, San Francisco Municipal Transit Agency, Sound Transit, King County Metro, San Mateo County Transit District, Central Ohio Transit Authority, and Caltrain.

ETC Institute

ETC Institute (ETC), founded in 1982, is based in Olathe, Kansas. It provides onboard customer satisfaction and experience surveys, intercept surveys, rider and non-rider community surveys, and other types of communitywide transit surveys. ETC has more

than 40 years of experience in the design and administration of transportation-related market research for state departments of transportation, transit agencies, and metropolitan planning organizations, including Embark, Kansas City Regional Transit, Capital Area Transit System, LACMTA, North Central Texas Council of Governments, Dallas Area Rapid Transit, and Metropolitan Transportation Commission San Francisco.

ETC has been providing customer satisfaction and experience surveys to Metro since 2018 and performance has been satisfactory.

Hispanispace, LLC dba ThinkNow Research

Hispanispace, LLC dba ThinkNow Research (ThinkNow), established in 2012, is located in Burbank, CA. It provides qualitative and/or quantitative market research studies to help assess public opinions to help guide client's objectives in developing programs, initiatives, and messages. Existing clients include Sigma Alimentos, GAF Materials Corporation, Dish Network, and NetSpend.

ThinkNow currently provides market research, focus groups, and online surveys to Metro as a subcontractor and performance has been satisfactory.

ThinkNow is a Metro-certified small business enterprise.

Maroon Society, Inc.

Maroon Society Inc. (Maroon Society) is a Los Angeles-based Metro-certified Small Business Enterprise research firm that has been providing market research services for over 17 years. Maroon Society's expertise is focused on transportation and public health research for government agencies including the City of West Hollywood, Los Angeles Department of Water and Power, City of Los Angeles, LA SAFE, City of Santa Monica, and City of West Hollywood.

Maroon Society has previously provided urban greening research and outreach study and event staffing services to Metro and performance has been satisfactory.

Maroon Society is a Metro-certified small business enterprise.

Quantum Market Research, Inc.

Quantum Market Research, Inc. (QMR) is a full-service research firm founded in 2002. Located in Oakland, QMR provides survey research and market research consulting services. It has conducted research for the transit industry for the past 25 years and managed customer experience research studies for agencies and organizations including University of California San Francisco, Solano Transportation Authority, San Francisco Fine Arts Museums, Evitarus Inc., and San Francisco Exploratorium.

Redhill Group, Inc.

Redhill Group, Inc. (Redhill Group), located in Irvine, CA was established in 1998. It is a full-service market research firm specializing in transportation, entertainment, customer satisfaction, mystery shopping, product positioning, and ad tracking. Redhill Group has conducted transformative research studies for local and national organizations. Its clients include Clean Power Alliance, Omnitrans, Riverside Transit Agency, Southern California Regional Rail Authority, San Diego International Airport, and Southern California Association of Governments.

Redhill Group has provided research surveys and focus groups to Metro since 1997 and performance has been satisfactory.

Redhill Group is a Metro-certified small business enterprise.