



File #: 2022-0870, File Type: Contract

Agenda Number: 23.

**OPERATIONS, SAFETY, AND CUSTOMER EXPERIENCE COMMITTEE
FEBRUARY 16, 2023**

SUBJECT: CUSTOMER EXPERIENCE RESEARCH SERVICES BENCH

ACTION: AWARD BENCH CONTRACTS

RECOMMENDATION

AUTHORIZE the Chief Executive Officer to:

A. AWARD seven (7) bench Contract Nos. PS43815000 through PS43815006, for Customer Experience (CX) research services to the firms listed below, for a total not-to-exceed amount of \$6,893,226 for the initial three-year base term, plus \$2,531,252 for the first, one-year option and \$2,657,814 for the second, one-year option, for a combined total not-to-exceed amount of \$12,082,292, effective March 1, 2023, subject to resolution of protest(s), if any; and

1. Discipline 1: Intercept Survey

- 1.1 ETC Institute
- 1.2 Hispanispace, LLC dba ThinkNow Research
- 1.3 Maroon Society, Inc.
- 1.4 Redhill Group, Inc.

2. Discipline 2: Online and Telephone Survey

- 2.1 Barrios and Associates, LLC dba Communications Lab
- 2.2 EMC Research, Inc.
- 2.3 Maroon Society, Inc.
- 2.4 Quantum Market Research, Inc.
- 2.5 Redhill Group, Inc.

3. Discipline 3: Qualitative Research

- 3.1 Barrios and Associates, LLC dba Communications Lab
- 3.2 EMC Research, Inc.
- 3.3 Hispanispace, LLC dba ThinkNow Research
- 3.4 Maroon Society
- 3.5 Quantum Market Research, Inc.
- 3.6 Redhill Group, Inc.

4. Discipline 4: User Experience Testing

4.1 Redhill Group, Inc.

5. Discipline 5: General Research Support

5.1 Maroon Society, Inc.

5.2 Redhill Group, Inc.

B. EXECUTE individual task orders for up to \$2 million per task order.

ISSUE

Metro's Customer Experience (CX) Research Team requires a bench contract for professional services with five disciplines: intercept surveys, online and telephone surveys, qualitative research, user experience (UX) testing, and general research support.

Depending on the goal of the project, the Metro project manager will decide which research discipline will be used. For all tasks valued up to \$100,000, a task order will be awarded to a contractor in a specific discipline following a competitive procurement process. For tasks valued at less than \$100,000, the contractor will be awarded on a rotational basis.

BACKGROUND

Metro has historically used a mix of in-house and consultant resources, depending on staff availability and complexity, to conduct research to understand customer wants and needs. When the CX department was formed, the CX staff used firms on the Countywide Planning and Development Bench under the Research and Surveying Discipline to conduct research, including the annual Customer Experience Rider Survey, as well as research needed to measure the impact of customer-related investments (e.g., Respect the Ride Before/After Survey), assist with engagement for representative public input (e.g., CLAX Survey), and user experience testing existing and new products or services Metro offers its riders and employees (e.g., Equity Information Hub).

However, as Metro continues to expand its work to improve the customer experience and needs for customer-focused research continue to grow, the Customer Experience office determined it requires additional, specialized research skillsets to gain more insight into our customers' lifestyles, habits, and preferences, as well as to measure the impact of the initiatives put in place through the annual CX plan.

DISCUSSION

As customer experience improvements continue to be an important focus for our agency, a research bench will provide staff with an efficient and effective way to continue to establish broad customer experience priorities, monitor progress in improving the customer experience, understand improvement opportunities along the customer journey, and evaluate the impact of our investments on the customer.

To that end, staff is developing a customer research plan to identify and fill any gaps in the agency's

current research program with the goal of gathering honest feedback and secondary data that will inform key decisions to improve our customers' experience using the system. The additional research will contribute to ensuring CX Plans are actionable and outcome-oriented and based on input from our riders, employees, and other key stakeholders and that the team can analyze, report, and use data to create a better customer experience.

In addition to the online surveys and in-person questionnaires currently in use by Metro, potential expanded research could include:

- customer journey mapping,
- ethnographic research
- user experience (UX) testing of Metro products and services,
- rider segmentation,
- rider/non-rider research panels,
- pulse surveys,
- online customer panels and forums
- focus groups and in-depth interviews
- evaluation of pilot programs,
- customer needs surveys to improve equity and inclusion in our service

Staff recommends a total funding value of just over \$12 million for this new bench.

DETERMINATION OF SAFETY IMPACT

The approval of this Bench will not impact the safety of our customers and employees.

FINANCIAL IMPACT

No change to FY23 Budget. Project Managers using the bench service providers are responsible for budgeting the cost annually. The funding source for this CX activity is operating eligible funds, including fares, sales tax, and eligible grants.

Since this is a multi-year contract, the cost center manager and Chief Customer Experience Officer will be responsible for budgeting costs in future years, including any options exercised.

Impact to Budget

The funding for these task orders is dependent upon the specific project. Generally, Propositions A and C, Measure M, and Transportation Development Act (TDA) Administration funds used for planning activities that are not eligible for bus or rail capital and operating will be used.

EQUITY PLATFORM

The CX On-Call Bench will ensure Metro will be able to reach a broader base of current and potential customers by allowing us to conduct research in multiple languages and using different methodologies, e.g., in-person surveys and interviews, online surveys, etc. Experience with equity in research, especially with historically disadvantaged populations, was a criterion of the qualifications of the teams and each team demonstrated their experience. These ranged from working with Metro's Equity Focus Communities (EFCs), working with Community-Based Organizations (CBOs), and analyzing barriers to customer utilization of equity and rebate programs, including low income and non-English speaking customers. The CX On-Call Services Bench contracts provide business opportunities for seven firms. The Diversity and Economic Opportunity Department (DEOD) will establish a Disadvantaged Business Enterprise (DBE), Small Business Enterprise (SBE), and Disabled Veteran Business Enterprise (DVBE) goal for each Task Order Request to ensure maximum opportunity for participation in this contract. This solicitation was advertised through periodicals of general circulation, posted on Metro's Vendor Portal, and an e-mail notice to SBE firms with applicable NAICS codes. The Proposal Evaluation Team (PET) was diverse and comprised of different department personnel with various backgrounds to comprehensively evaluate proposers and subconsultants to determine the most qualified teams.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

Metro is working to create a customer-centric culture amongst all employees to improve customer experiences for the people and communities it serves. Therefore, the CX On-Call Services Bench supports strategic plan goals:

- **Goal #1:** "Provide high-quality mobility options that enable people to spend less time traveling."
- **Goal #2:** "Deliver outstanding trip experiences for all users of the transportation system."
- **Goal #3:** "Enhance communities and lives through mobility and access to opportunity."

ALTERNATIVES CONSIDERED

The Board could choose not to approve the recommendations. This is not recommended as the award of these task orders under the bench contract would then be pursued as separate procurements, which, for each task order, could potentially take up to nine months to complete. This would limit our ability to respond quickly to needs and meet tight project delivery schedule constraints.

NEXT STEPS

Upon Board approval, staff will establish and execute the Bench contracts. Staff will solicit responses to individual task order requests from specific disciplines as needed. SBE, DVBE, and/or DBE goal requirements will be set for each individual task order.

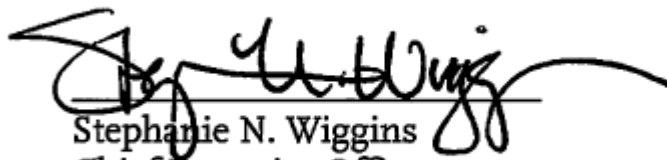
ATTACHMENTS

Attachment A - Procurement Summary

Attachment B - DEOD Summary

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