

**SOUND TRANSIT
STAFF REPORT**

MOTION NO. M2008-70

Contract for Transit Survey and Reporting Services

Meeting:	Date:	Type of Action:	Staff Contact:	Phone:
Finance Committee	7/17/08	Discussion/Possible Action	Ahmad Fazel, Link Executive Director Mike Williams, Program Manager Brant Lyerla, Project Development Coordinator	(206) 398-5389 (206) 398-5145 (206) 398-5404

Contract/Agreement Type:	<input checked="" type="checkbox"/>	Requested Action:	<input checked="" type="checkbox"/>
Competitive Procurement	<input checked="" type="checkbox"/>	Execute New Contract/Agreement	<input checked="" type="checkbox"/>
Sole Source	<input type="checkbox"/>	Amend Existing Contract/Agreement	<input type="checkbox"/>
Agreement with Other Jurisdiction(s)	<input type="checkbox"/>	Budget Amendment	<input type="checkbox"/>
Real Estate	<input type="checkbox"/>	Property Acquisition	<input type="checkbox"/>

PROJECT NAME

Central Link Light Rail Initial Segment

OPP Fare Integration Program

PROPOSED ACTION

Authorizes the chief executive officer to execute a one-year contract with Opinion Research Northwest to provide transit survey and reporting services for the Central Link Light Rail Initial Segment Before and After Study transit survey and the 2008 Sound Transit Origin/Destination Survey for a total authorized contract amount not to exceed \$648,565.

KEY FEATURES of PROPOSED ACTION

- The action provides for the services needed to conduct the on-board survey portion of the Central Link Light Rail Initial Segment Before and After Study, a requirement of the Central Link Light Rail Initial Segment Full Funding Grant Agreement.
- The action also provides for the services needed for the 2008 Sound Transit Origin/Destination Survey. The survey will provide transit rider data needed by the Office of Policy and Planning to support its analysis and preparation of recommendations, including fare policy recommendations to the Sound Transit Board. The consultant will not conduct any work related to the 2008 Sound Transit Origin/Destination Survey until receiving written authorization from Sound Transit.
- The contract includes all the elements necessary to conduct on-board origin destination surveys, data analysis, and report preparation in support of both the Central Link Light Rail Initial Segment Before and After Study and the 2008 Sound Transit Origin/Destination Survey.

- The amount of the contract for the scope of work related to the Central Link Light Rail Initial Segment Before and After Study shall not exceed \$399,000.
- The amount of the contract for the scope of work related to the 2008 Sound Transit Origin/Destination Survey shall not exceed \$249,565.

BUDGET IMPACT SUMMARY

There is no action outside of the Board-adopted budget; there are no contingency funds required, no subarea impacts, or funding required from other parties other than what is already assumed in the financial plan.

BUDGET and FINANCIAL PLAN DISCUSSION

Link Light Rail

The Adopted 2008 Lifetime Capital Budget for the Central Link Initial Segment is \$2.07 billion. Within that amount, \$580,000 has been set aside for the “before” portion of the Before and After Study in the agency administration phase. The FFGA grant is expected to be closed prior to conducting the “after” portion of the Before and After Study, so the costs associated with the after survey will come from the operations budget. When added to current commitments of \$41,386 for this budget line item, the proposed action would increase this amount by \$399,000 to a revised total commitment of \$440,386, and leave a remaining balance of \$139,614.

Office of Policy and Planning

The Adopted 2008 Lifetime Operating Budget for the Fare Integration Program is \$26,672,654. Within that amount, \$546,661 has been set aside for Market Research Support. The proposed action is to fund the 2008 Origin/Destination Survey in the amount of \$249,565. This action would leave a balance of \$189,841 for Market Research Support, and an operating budget balance of \$5,658,669.

The proposed action is consistent within the current adopted budget, and is affordable within the agency’s long-term financial plan and subarea financial capacity. The action will have no new revenue impact on Sound Transit.

BUDGET TABLE

(Year of Expenditure \$000)

Link Light Rail

Action Item: Opinion Research Northwest (provide transit survey and reporting services for the Central Link Initial Segment Before & After Study transit survey)

Initial Segment	Adopted 2008 Lifetime Budget ¹ (A1)	Committed To Date (B1)	This Action (C1)	Total Committed & Action (D1)	Uncommitted (Shortfall) (E1)
Agency Administration	193,274	169,659	399	170,058	23,216
Preliminary Engineering	33,310	33,286		33,286	25
Final Design	147,213	146,382		146,382	831
Right of Way	208,396	207,010		207,010	1,387
Construction	1,191,768	1,154,095		1,154,095	37,672
Construction Services	100,317	98,717		98,717	1,600
Third Party Agreements	63,414	63,393		63,393	22
Vehicles	132,307	131,799		131,799	508
Total Current Budget	2,070,000	2,004,340	399	2,004,739	65,261

Agency Administration Phase Detail	(F1)	(G1)	(H1)	(I1)	(J1)
Before & After Study	580	41	399	440	140
Other Agency Administration	192,694	169,617		169,617	23,077
Total Phase	193,274	169,659	399	170,058	23,216

Contract Amount	Board Approvals to Date (K1)	Current Approved Contract Value (L1)	Proposed Action (M1)	Proposed Total for Board Approval (N1)	Proposed Contract Value (O1)
Contract Amount	-	-	399	399	399
Contingency	-	-	-	-	-
Total Contract - Link Light Rail	-	-	399	399	399
Percent Contingency	0%	0%	0%	0%	0%

(B1) COMMITTED TO DATE amounts are from Agency WBS Report as of May 2008 + approved and pending board actions not recorded as of 5/31/08, or submitted after that date.

Office of Policy and Planning (OPP)

Action Item: Opinion Research Northwest (provide transit survey and reporting services for the 2008 Sound Transit Origin/Destination Survey)

Project 405 - Fare Integration	Adopted 2008 Lifetime Budget ¹ (A2)	Spent To Date ² (B2)	This Action (C2)	Total Committed & Action (D2)	Uncommitted (Shortfall) (E2)
Operating Budget	26,673	20,764	250	21,014	5,659
Capital Budget	15,867	5,850	-	5,850	10,017
Total Current Budget	42,540	26,614	250	26,864	15,676

Phase Detail	Adopted 2008 Lifetime Budget ¹ (F2)	Spent To Date ² (G2)	This Action (H2)	Total Committed & Action (I2)	Uncommitted (Shortfall) (J2)
Market Research Support	547	107	250	357	190
Other Operating Activity	26,126	20,657	-	20,657	5,469
Total Phase	26,673	20,764	250	21,014	5,659

Contract Amount	Board Approvals to Date (K2)	Current Approved Contract Value (L2)	Proposed Action (M2)	Proposed Total for Board Approval (N2)	Proposed Total Contract Value (O2)
Contract Amount	-	-	250	250	250
Contingency	-	-	-	-	-
Total Contract - Capital Projects	-	-	250	250	250
Percent Contingency	0%	0%	0%	0%	0%

Notes:

¹ Project budget is located on page 39 of the Proposed 2008 Budget book. The Adopted 2008 Budget with amendments was approved by the Board on November 29, 2007.

² Spent to date amount includes actual outlays and commitments through May 31, 2008.

TOTAL Contract Amount	Board Approvals to Date (K)	Current Approved Contract Value (L)	Proposed Action (M)	Proposed Total for Board Approval (N)	Proposed Contract Value (O)
Contract Amount	-	-	649	649	649
Contingency	-	-	-	-	-
TOTAL Contract	-	-	649	649	649
Percent Contingency	0%	0%	0%	0%	0%

SMALL BUSINESS PARTICIPATION

The consultant was not required to provide a plan for subcontracting opportunities. However, Opinion Research Northwest as the prime consultant has agreed to subcontract with Research Assurance, a small business firm, in the amount shown in the table below:

Utilization Breakdown Table

Subconsultant/Subcontractor	Business Type	% of Work	Dollar Value
Research Assurance	Small Business	3%	\$20,000
Total		3%	\$20,000

EEO Commitment

Opinion Research Northwest workforce demographics are 26% people of color and 47% women.

PROJECT DESCRIPTION and BACKGROUND for PROPOSED ACTION

The Central Link Light Rail Initial Segment received a \$500 million Section 509 Full Funding Grant Agreement (FFGA) under the Federal Transit Administration (FTA) "New Starts" program. All New Starts grant recipients are required to conduct an analysis called the "*Before and After Study*" for the FTA. The Before and After Study fulfills two main objectives: 1) expands insights into the costs and impacts of major transit investments; and 2) improves the technical methods and procedures used in the planning and development of those investments.

The Before and After Study covers five characteristics of the light rail project including the physical scope, service levels, capital costs, operations and maintenance costs, and ridership and fare revenues.

Sound Transit staff recommends retaining the services of Opinion Research Northwest to conduct a survey of transit riders in fall 2008 to provide data for the ridership element of the Before and After Study for the Central Link Light Rail Initial Segment. The survey will collect data regarding the origins and destinations of transit riders on Metro routes in the corridor served by the Central Link Light Rail Initial Segment. Survey data will also be collected to capture the transfer rate of Sounder passengers at King Street Station. Additionally, the survey will collect information about transit access mode, trip purpose, transfers, fare, fare media, and demographics. The survey collection will only cover the ridership information for the "Before" portion of the study. The "After" on-board survey will take place in the fall of 2011, two years after the start of revenue service. This contract only covers the "Before" survey of the ridership element of the study.

In addition to the Before and After Study, the Office of Policy and Planning is conducting a similar system-wide transit survey of riders on Sound Transit services. The survey data will be used to support policy and planning recommendations. Sound Transit will provide written authorization to the consultant in order to perform this work.

The selection of Opinion Research Northwest was made through a competitive procurement process that included the evaluation of qualifications and a fixed cost proposal.

Analysis of contracting out versus in-house

On-board transit survey data collection, analysis and reporting services require specialized skills and significant staffing requirements that cannot be provided using existing Sound Transit staff. The consultant will be able to provide the staff to fulfill the needs. Also, due to the project's short time frame, it is not feasible for Sound Transit to hire additional staff to complete this work.

Prior Board/Committee Actions

Motion/Resolution Number and Date	Summary of Action
R2003-20 10/23/2003	A RESOLUTION of the Board of the Central Puget Sound Regional Transit Authority relating to the \$500 million full funding grant agreement with the Federal Transit Administration

CONSEQUENCES of DELAY

For the Before and After Study, the transit rider survey data must be collected prior to the opening of the Central Link Light Rail Initial Segment. The FTA-approved Before and After Study Plan identifies fall 2008 as the prescribed time to collect the "before" survey data. Delays in executing this contract would affect Sound Transit's ability to collect the data in fall 2008 and fulfill its commitment to FTA.

PUBLIC INVOLVEMENT

Sound Transit will conduct public outreach prior to conducting the survey, in order to inform the affected communities and create awareness of the importance of collecting this survey information from transit riders.

ENVIRONMENTAL COMPLIANCE

SSK 7-10-08

LEGAL REVIEW

JW 7/11/08

SOUND TRANSIT

MOTION NO. M2008-70

A motion of the Finance Committee of the Central Puget Sound Regional Transit Authority authorizing the chief executive officer to execute a one-year contract with Opinion Research Northwest to provide transit survey and reporting services for the Central Link Light Rail Initial Segment Before and After Study transit survey and the 2008 Sound Transit Origin/Destination Survey for a total authorized contract amount not to exceed \$648,565.

Background:

The Central Link Light Rail Initial Segment received a \$500 million Section 509 Full Funding Grant Agreement (FFGA) under the Federal Transit Administration (FTA) "New Starts" program. All New Starts grant recipients are required to conduct an analysis called the "Before and After Study" for the FTA. The Before and After Study fulfills two main objectives: 1) expands insights into the costs and impacts of major transit investments; and 2) improves the technical methods and procedures used in the planning and development of those investments.

The Before and After Study covers five characteristics of the light rail project including the physical scope, service levels, capital costs, operations and maintenance costs, and ridership and fare revenues.

Sound Transit staff recommend retaining the services of Opinion Research Northwest to conduct a survey of transit riders in fall 2008 to provide data for the ridership element of the Before and After Study for the Central Link Light Rail Initial Segment. The survey will collect data regarding the origins and destinations of transit riders on Metro routes in the corridor served by the Central Link Light Rail Initial Segment. Survey data will also be collected to capture the transfer rate of Sounder passengers at King Street Station. Additionally, the survey will collect information about transit access mode, trip purpose, transfers, fare, fare media, and demographics. The survey collection will only cover the ridership information for the "Before" portion of the study. The "After" on-board survey will take place in the fall of 2011, two years after the start of revenue service. This contract only covers the "Before" survey of the ridership element of the study.

In addition to the Before and After Study, the Office of Policy and Planning is conducting a similar system-wide transit survey of riders on Sound Transit services only. The survey data will be used to support policy and planning recommendations. Sound Transit will provide written authorization to the consultant in order to perform this work.

The selection of Opinion Research Northwest was made through a competitive procurement process that included the evaluation of qualifications and a fixed cost proposal.

Analysis of contracting out versus in-house

On-board transit survey data collection, analysis and reporting services require specialized skills and significant staffing requirements that cannot be provided using existing Sound Transit staff. The consultant will be able to provide the staff to fulfill the needs. Also, due to the project's short time frame, it is not feasible for Sound Transit to hire additional staff to complete this work.

Motion:

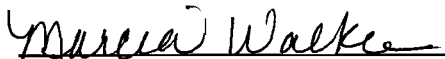
It is hereby moved by the Finance Committee of the Central Puget Sound Regional Transit Authority that the chief executive officer is authorized to execute a one-year contract with Opinion Research Northwest to provide transit survey and reporting services for the Central Link Light Rail Initial Segment Before and After Study transit survey and the 2008 Sound Transit Origin/Destination Survey for a total authorized contract amount not to exceed \$648,565.

APPROVED by the Finance Committee of the Central Puget Sound Regional Transit Authority at a regular meeting thereof held on July 17, 2008.



Aaron Reardon
Finance Committee Chair

ATTEST:



Marcia Walker
Board Administrator