

**SOUND TRANSIT
STAFF REPORT**

MOTION NO. M2008-19

Contract for Marketing/Public Opinion Research Consultant Services

Meeting:	Date:	Type of Action:	Staff Contact:	Phone:
Finance Committee	2/7/08	Discussion/Possible Action	Ric Ilgenfritz, Executive Director of Policy, Planning and Public Affairs Geoff Patrick, Media Relations and Public Information Manager	(206) 398-5239 (206) 398-5313

Contract/Agreement Type:	✓	Requested Action:	✓
Competitive Procurement	✓	Execute New Contract/Agreement	✓
Sole Source		Amend Existing Contract/Agreement	
Agreement with Other Jurisdiction(s)		Budget Amendment	
Real Estate		Property Acquisition	

PROPOSED ACTION

Authorizes the chief executive officer to execute a one-year contract with two one-year options to extend with EMC Research to provide public opinion, marketing, and customer satisfaction research services on an as-needed basis for a total authorized contract amount not to exceed \$480,000.

KEY FEATURES of PROPOSED ACTION

Anticipated services include developing, fielding and analyzing:

- On-board surveys to measure customer satisfaction.
- Focus groups to test rider information, marketing approaches and public benefits and support for system expansion options.
- Marketing segmentation studies to help develop and refine marketing approaches and appropriate tools to increase ridership on Sound Transit services.
- Telephone surveys to research current attitudes, public awareness, public satisfaction with Sound Transit’s performance and opinions regarding system expansion options.

Each project will require a scope of work and work order before any work is authorized by the project manager.

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

Expenditures for this contract are charged to the Media Relations and Public Information account in the Office of Policy, Planning, and Public Affairs department. This account has a budget of \$843,740 for 2008 and a Services line item budget of \$252,300. This action would commit \$160,000 of the 2008 Services budget and \$320,000 to future year’s budget.

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

BUDGET TABLE

Summary for Board Action (Year of Expenditure \$000)

Department: Media Relations and Public Information Staff Operating Budget

(in 000's)	2008 Adopted Budget ¹ (A)	Committed To Date ² (B)	This Action (C)	Total Committed & Action (D)	Uncommitted (Shortfall) (E)
1 Salaries & Benefits	\$ 580	\$ 19	\$ -	\$ 19	\$ 561
2 Services	\$ 252	\$ 1	\$ 160	\$ 161	\$ 91
3 Materials and Supplies	\$ 2	\$ -	\$ -	\$ -	\$ 2
4 Miscellaneous Expenses	\$ 3	\$ 0	\$ -	\$ 0	\$ 3
5 Leases and Rentals	\$ -	\$ -	\$ -	\$ -	\$ -
6 Other Expenses	\$ 7	\$ -	\$ -	\$ -	\$ 7
7 Total Current Budget	\$ 844	\$ 20	\$ 160	\$ 180	\$ 663

Budget Detail (in 000's)	2008 Spending Plan (F)	Future Years Spending (G)	Direct Charges to Account (H)	Total (I)
8 EMC Research	\$ 160	\$ 320	\$ -	\$ 480
9 Total	\$ 160	\$ 320	\$ -	\$ 480

Contract Budget (in 000's)	Current Approved Contract Value (J)	Committed To Date ² (K)	Proposed Action (L)	Proposed Total Contract Value (M)
10 EMC Research	\$ -	\$ -	\$ 480	\$ 480
11 Contingency	\$ -	\$ -	\$ -	\$ -
12 Total	\$ -	\$ -	\$ 480	\$ 480
13 Percent Contingency	0%	0%	0%	0%

Notes:

¹ Project budget is located on page 209 of the Proposed 2008 Budget book, it is included in the budget for Office of Policy Planning and Public Affairs Staff Operating Budget. The 2008 Budget was adopted by the Board on November 29, 2007.

² Committed to date amount includes actual outlays and commitments through January 17, 2008.

SMALL BUSINESS PARTICIPATION

Prime Consultant/Contractor

EMC Research is the prime consultant, is a small business, and will perform 100% of the work for this contract. If additional resources are deemed necessary to perform the work, EMC Research has committed to utilizing DBE and other small businesses as subconsultants.

Utilization Breakdown Table

The breakdown of work by the prime consultant and subconsultant/subcontractors will be determined for each specific project undertaken under this contract based on its scope of work.

EEO Commitment

EMC Research's workforce demographics are 21% women and 0% minorities. EMC Research is committed to uphold and enforce all applicable EEO rules and regulations.

PROJECT DESCRIPTION and BACKGROUND for PROPOSED ACTION

Sound Transit has conducted periodic marketing, customer satisfaction, and public opinion research since the agency was created in 1996. This research has played a significant part in measuring the effectiveness of Sound Transit programs and services. Past research has also provided the Board and staff with vital information for evaluating public opinion on system expansion proposals.

In December 2007, Sound Transit issued a request for proposals (RFP) for public opinion research services. The proposals were evaluated by a panel of staff members who ranked and scored them against criteria outlined in the RFP. EMC Research submitted the highest ranking proposal.

The Finance Committee's last authorization of a contract for public opinion research services was in September 2004. Following Finance Committee approval, EMC Research (formerly Evans/McDonough Company) was awarded that contract following a procurement in which the panel selected its proposal as most competitive.

Prior Board/Committee Actions

None.

CONSEQUENCES of DELAY

Delays in executing this contract could affect research projects to assist in developing Sound Transit system expansion plans and could delay efforts in conjunction with the Transportation Services Department to continue building ridership on Sound Transit services. The agency needs reliable data to help shape system expansion proposals and guide marketing efforts.

ENVIRONMENTAL COMPLIANCE

Not applicable to this action.

LEGAL REVIEW

JW 1/31/08

SOUND TRANSIT

MOTION NO. M2008-19

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 two one-year options to extend with EMC Research to provide public opinion, marketing, and customer satisfaction research services on an as-needed basis for a total authorized contract amount not to exceed \$480,000.

Background:

Sound Transit has conducted periodic marketing, customer satisfaction, and public opinion research since the agency was created in 1996. This research has played a significant part in measuring the effectiveness of Sound Transit programs and services. Past research has also provided the Board and staff with vital information for evaluating public opinion on system expansion proposals.

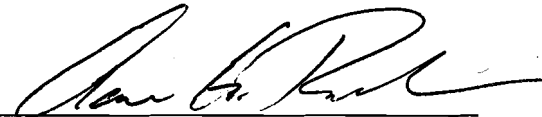
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Motion:

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 two one-year options to extend with EMC Research to provide public opinion, marketing, and customer satisfaction research services on an as-needed basis for a total authorized contract amount not to exceed \$480,000.

APPROVED by the Finance Committee of the Central Puget Sound Regional Transit Authority at a regular meeting thereof held on February 14, 2008.



Aaron Reardon
Finance Committee Chair

ATTEST:



Marcia Walker
Board Administrator