

Date: October 26, 2016

To: Board of Directors

From: Neil McFarlane 

Subject: **RESOLUTION 16-10-63 OF THE TRI-COUNTY METROPOLITAN TRANSPORTATION DISTRICT OF OREGON (TRIMET) AUTHORIZING A CONTRACT WITH PATINKIN RESEARCH STRATEGIES, LLC FOR PUBLIC OPINION RESEARCH SERVICES**

1. Purpose of Item

The purpose of this item is to request that the TriMet Board of Directors (Board) adopt a Resolution authorizing a contract with Patinkin Research Strategies, LLC (Patinkin) for public opinion research services (Services)

2. Type of Agenda Item

- Initial Contract
- Contract Modification
- Other _____

3. Reason for Board Action

Board approval is required for all personal services contracts obligating TriMet to pay in excess of \$150,000.

4. Type of Action:

- Resolution
- Ordinance 1st Reading
- Ordinance 2nd Reading
- Other _____

5. Background

The Portland Metropolitan region is experiencing continued population growth, accelerating congestion, the potential for major seismic events, efforts to address global climate change and the ongoing need to preserve and maintain existing transportation assets. TriMet and its regional transportation partners seek to address these challenges and better understand which of these pressing transportation issues the region’s voters are most concerned with and whether there are circumstances under which the region’s voters would be likely to support additional funding to address these needs.

TriMet currently has multiple contracts for on-call market research that were awarded resulting from a Request For Proposal (RFP) conducted in April 2013. Contracts were awarded for specific service categories of research methods and are not comprehensive

enough to cover the entire scope of public opinion research services required under the subject RFP. Therefore, it was determined that a separate RFP would be conducted.

6. Procurement Process

TriMet issued a RFP on September 2, 2016 for public opinion research services to gain a comprehensive understanding of voter perceptions within the boundaries of the district related to potential funding of transportation improvements in the region. Proposals were due on September 23rd. Six (6) proposals were received from Riley Research Associates; Northwest Research Group, LLC; Davis, Hibbitts, and Midghall, Inc. dba DHM Research; Patinkin; PRR, Inc.; and EMC Research, Inc.

An evaluation committee (Committee), comprised of Public Affairs staff, was appointed to review, evaluate and score the proposals. The Committee met on October 3rd to discuss their initial technical scores and decide on next steps. The evaluation criteria in the RFP included experience and qualifications of the firm and key staff as well as a work plan for the Services to be provided. Within the criteria for experience and qualifications of the firm and key staff, the RFP required proposers to include information on their workforce diversity and experience providing subcontract opportunities for minority, women, emerging and service disabled veteran owned businesses. Following the Committee's review of technical proposals, they decided that three of the six firms demonstrated the technical capability to perform the work and opened price proposals of those three firms. Below is a summary of the scores from the three firms in the competitive range:

Criterion (points)	DHM Research	Patinkin	EMC Research
Experience & Capability of the Firm (20 pts)	18	17	16
Experience & Qualifications of Key Staff (20 pts)	17	16	15
Project Understanding and Work Plan (40 pts)	35	38	30
Technical Score	70	71	61
Proposed Price	\$181,750	\$162,050	\$179,200
Price Score(20)	18	20	18
Total Score	87	91	79

Although final scores were close, the Committee felt that Patinkin demonstrated a very good understanding of the Services to be performed and TriMet's objective. Their price was also significantly lower than the other two firms within the competitive range and, therefore, the Committee agreed that their proposal represents the best value to TriMet and is recommending them for award of the contract.

TriMet anticipates that this effort would entail a multi-phased, iterative effort using a variety of public opinion measurement tools including polls, focus groups, on line surveys and other industry standard practices for gathering voter attitudes. It is expected that work would commence following Board approval and conclude by summer 2018.

This Resolution authorizes TriMet to contract with Patinkin for the Services in the amount of \$162,050. The contract will be structured as a firm fixed price for the Services to be performed. No price adjustments will be allowed and payment will be made in the form of progress payments as the Services are performed and approved by TriMet's project manager

up to, but not to exceed the amount of the contract.

7. **Diversity**

Patinkin only has two employees: one male and one female, neither are minority. They do intend to subcontract some of the work regarding focus group recruitment, data analytics and processing, telephone survey outreach and voter file and sample development. Due to the specialized nature of each of those areas, Patinkin is not planning on utilizing any certified firms to perform those services.

8. **Financial/Budget Impact**

The amount of the contract will be \$162,050. The Services are included in Public Affairs' FY17 budget.

9. **Impact if Not Approved**

If this contract is not approved, TriMet would not be able to conduct the necessary public opinion research services necessary to prepare for the anticipated ballot measure in 2018.

BB/LS/pi

RESOLUTION 16-10-63

RESOLUTION OF THE TRI-COUNTY METROPOLITAN TRANSPORTATION DISTRICT OF OREGON (TRIMET) AUTHORIZING A CONTRACT WITH PATINKIN RESEARCH STRATEGIES, LLC FOR PUBLIC OPINION RESEARCH SERVICES

WHEREAS, TriMet has authority under ORS 267.200 to execute a contract with Patinkin Research Strategies, LLC for public opinion research services (Contract); and

WHEREAS, the total amount of the Contract shall exceed \$150,000; and

WHEREAS, the TriMet Board of Directors (Board), by Resolution dated November 25, 2009, adopted a Statement of Policies requiring the Board to approve personal services in excess of \$150,000;

NOW, THEREFORE, BE IT RESOLVED:

1. That the Contract shall be in conformance with applicable laws.
2. That the General Manager or his designee is authorized to execute the Contract.

Dated: October 26, 2016

Presiding Officer

Attest:

Recording Secretary

Approved as to Legal Sufficiency:



Legal Department