



PROPOSAL  
RFP 9-1505  
AUGUST 20, 2019

# Orange County Transportation Authority Transportation Needs Assessment





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August 20, 2019

Mr. Masih Bahadori  
Principal Contract Administration  
Orange County Transportation Authority  
Contracts Administration and Materials Management (CAMM)  
600 South Main Street  
Orange, California 92868

***Subject: Proposal for RFP #9-1505, Transportation Needs Assessment***

Dear Mr. Bahadori:

With this letter, Moore & Associates, Inc. presents its proposal to complete a Transportation Needs Assessment (TNA) on behalf of the Orange County Transportation Authority.

Throughout its long history, the OCTA has conducted a wide array of market research and community engagement projects and activities. The "market intelligence" gained from these efforts has helped shape OCTA activities, programs, and services. What is expected to distinguish the TNA from prior market research efforts is twofold: 1) An emphasis on ethnic and diverse communities, and 2) utilization of strategies and tactics leading to meaningful engagement, especially as it pertains to underserved and/or difficult-to-reach populations.

While statistically valid market research is an important component of successful service/program development, input from individuals who are often missed as a result of either a "big net" or highly formalized approach cannot be discounted. As a publicly-funded transportation organization, the OCTA has a responsibility to ensure its programs and services address the mobility needs and priorities of the broad spectrum of residents throughout the entire county. This is especially important given traditional/formalized outreach efforts often fail to identify and engage the very persons who could benefit most from OCTA programs and services. It is not "good enough" to merely identify actual barriers to use of public transportation programs and services. Rather, it is equally important to identify (and address) perceived barriers to public transportation usage.

So why select Moore & Associates, Inc. for this project versus another firm? First, our public transportation focus. We understand OCTA's business, the importance of the programs and services it provides, and the importance of community-wide perception and support. Second, our

considerable market research and community engagement experience. Moore & Associates, Inc. has direct, first-hand, successful experience conducting each of the research/engagement activities OCTA envisions for this project. We are particularly strong (through our teaming with ANIK International and Continental Interpreting Services) at engaging underserved as well as difficult to reach populations. Our outreach/engagement strategy is results-oriented, not driven merely by “sample size” or statistical validity. Finally, the experience gained through completion of similar projects will allow us to provide OCTA with important, practical insight into the wants, needs, and mobility priorities of existing as well as potential customers. It is not good enough to deliver a “laundry list” of service development ideas without also being able to provide insight into the anticipated Return on Investment.

Enclosed are one original, five hard copies, and one electronic copy (in .pdf format on a flash drive) of our proposal. This submission represents a firm offer which remains in effect for 120 days from the filing deadline. All information submitted with the proposal is true and correct. We acknowledge receipt of Addendum #1, dated August 8, 2019. As our firm’s Corporate Treasurer, I am authorized to negotiate and sign any legally binding contract on behalf of our firm. Should you have any questions, please contact me by phone at 888.743.5977 or by email at [stephanie@moore-associates.net](mailto:stephanie@moore-associates.net).

Contact information for our proposed subcontractors is provided below.

Nisha Shah  
ANIK International, Inc.  
746 S. Los Angeles St. #607,  
Los Angeles, CA 90014  
(323) 839-2838  
[nisha@anikintl.com](mailto:nisha@anikintl.com)

Stephanie Fiorito  
Continental Interpreting Services  
22699 Old Canal Road,  
Yorba Linda, CA 92887  
(800) 201-7121  
[stephanief@cis-inc.com](mailto:stephanief@cis-inc.com)

Moore & Associates is committed and confident in our promise to complete this project with exceptional quality and within the identified time period. We look forward to the opportunity to discuss our proposed project approach, credentials, and experience with your selection committee.

Thank you for your consideration of Moore & Associates, Inc.

Sincerely,



Stephanie Roberts  
Corporate Treasurer



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# 1. Qualifications, Experience, and References

For nearly 30 years, Moore & Associates has focused solely on public transportation and transit, which provides our firm with a unique perspective and expertise. We look at the big picture, with both short-term and long-term goals in mind. This approach supports each client's goal of providing efficient and effective services.

We have assisted clients throughout the nation in crafting innovative and community-based public transit solutions since 1991. Implementation of service recommendations resulting from our market research has consistently resulted in quantifiable benefits such as increased ridership, increased fare revenue, and growth in community support for client programs and services.

We have been both the data collector and data end-user. Therefore, we understand how important accurate, quality market research is as an element of strategic planning and program development. Successful market research allows public transportation organizations such as OCTA to identify program strengths and weaknesses while developing strategies to enhance services, thereby retaining current customers as well as attracting new customers. Decisions in planning and policy-making require a solid foundation of quality, current data regarding travel patterns, market trends, customer perceptions, demographic profiles, and demand for public transportation services.

We believe Moore & Associates is the optimal choice for this assignment for a number of reasons:





- **Our proven track record.** In addition to consistently completing projects on-time and within budget, a measure of our success is the number of long-term and repeat engagements. Examples include market research for Nassau (NY) Inter-County Express (2013, 2016, and 2019); Los Angeles County Metropolitan Transportation Authority (2012-2015, 2018-present); Long Beach Transit (2016, 2017-present); Golden Empire Transit District (2009, 2013, 2015, as well as marketing and advertising services 2017-present); City of Burbank (multiple projects 1994-present); and City of Fort Collins (2015-2017, 2019).
- **Our industry expertise.** Our proposed project team possesses significant collective experience gained through successful completion of similar assignments. Our Associates share a high level of professional expertise, combining the wisdom of experience with the latest in industry practices and technology.
- **Local knowledge.** Our project team possesses first-hand knowledge of Orange County through our prior work with OCTA as well as engagements with the cities of Irvine, Laguna Beach, Laguna Niguel, and Mission Viejo. This gives us valuable insight into the mobility needs and priorities of the region.
- **Our dedicated market research team.** Moore & Associates' staff includes a full-time market research/survey team. This translates to quality, flexibility, and cost-effectiveness.
- **Multilingual capabilities.** Our in-house market research team includes bilingual (Spanish) personnel. Our long-standing partnerships with our subcontractors, ANIK





International and Continental Interpreting Services effectively expand our multi-lingual capabilities, addressing the full scope of languages and cultural elements outlined by OCTA in its RFP.

- **Big-picture vision.** Given Moore & Associates also provides transit planning and marketing services, our understanding into how the data and insights we collect will ultimately be utilized shapes the very way we approach each assignment.

Our experience conducting on-board customer surveys and community surveys for public transportation organizations throughout Alaska, Arizona, California, Colorado, Michigan, New York, Texas, Utah, Washington, and beyond provides us with the practical experience and “lessons learned” to perform all the tasks outlined in OCTA’s Scope of Services in an effective and efficient manner.

## **Firm Profile**

Founded in 1991 and incorporated in California, Moore & Associates, Inc. specializes in providing planning, marketing, market research, performance audit, and support services to public transportation providers throughout the United States. Moore & Associates employs 12 full-time Associates at its offices in northern Los Angeles County. The firm is financially stable, with no conditions that might impede its ability to complete the proposed project. Further Moore & Associates does not hire or partner with any lobbyists or advocates.



Though modest in size, Moore & Associates has the capability to handle large projects through staff cross-training and, as needed, partnerships with qualified subcontractors. In addition, our current and anticipated workload is such that we do not anticipate any challenges fulfilling OCTA's Scope of Work or meeting the deadlines specified in the RFP.

## Subcontractors

### ANIK International (DBE/SBE)

ANIK International is a staffing and field services firm based in downtown Los Angeles, specializing in hiring, training and managing highly skilled individuals. The firm's focus is field



staffing, public outreach staffing, and surveyor staffing primarily in the transportation sector. ANIK's field staff are masters in collecting information (data collection) or communicating information (public outreach). Staff are highly motivated, specially trained individuals with a strong focus on the goal set in front of them.

The ANIK team consists of a Staffing Director, Field Trainer, Senior Field Supervisor, two Field Supervisors, and 20 regular field staff (although they can provide up to 75 field staff fairly quickly given its staffing expertise and relationships in the community). Effective communication is key in their business, which is why half their staff are bilingual English-Spanish, allowing them to not just meet but exceed their client needs. In addition, ANIK has a depth of experience in recruiting staff of a variety of ethnic backgrounds and language capabilities including Arabic, Armenian, Farsi, French, Korean, Mandarin, Tagalog and



Vietnamese. ANIK partners with churches, schools, community centers, worksorce centers, and other community-based organizations in these ethnic/cultural communities to recruit local bilingual field staff so they are able to include underserved and/or hard-to-reach communities by breaking through language barriers.

Clients have included LA Metro, Los Angeles World Airports, SF MUNI, and Bob Hope Airport. In total, ANIK’s staff have surveyed and communicated client outreach messages in person to over 1,000,000 consumers. ANIK is certified as a DBE and SBE by the LACMTA.

Moore & Associates has partnered with ANIK on numerous transportation survey projects for clients including LA Metro and Foothill Transit. ANIK consistently provides high-quality temporary personnel, takes an active role in each project, and demonstrates a solid understanding of the unique skillset necessary for successful onboard surveying.

### Continental Interpreting Services (DVBE)

For more than 20 years, Continental Interpreting Services (CIS) has provided customers in a variety of industries with



language solutions that bridge communication gaps and transcend cultural barriers. Whether they are providing a one-on-one interpretation or document translation, they deliver exceptional, expert service from start to finish.

With a worldwide network of certified and qualified interpreters and translators representing over 150 languages, CIS brings its clients the highest quality interpreting and translation services—quickly, efficiently and cost effectively. Across the country, they are





respected for their expertise and appreciated for their friendly, attentive customer service. In 2014, CIS was ranked a Top 40 Language Service Company in North America. CIS is a member of the Association of Language Companies and the American Translators Association and is certified as a DVBE and Small Business by the State of California.

Moore & Associates has partnered with Continental Interpreting Services for a number of recent projects including LA Metro’s 2019 Customer Satisfaction Surveys and the City of Fresno’s 2019 Title VI Plan update.



## References and Related Experience

### Los Angeles County Metropolitan Transportation Authority



*2012 Quarterly Satisfaction Survey; 2012 Annual Satisfaction Survey; 2013 Quarterly Satisfaction Survey; 2013 Annual Customer Satisfaction Survey; 2014 Annual Customer Satisfaction Survey; FY 2014 Spring Satisfaction Survey; FY 2015 Fall Customer Satisfaction Survey; 2018 Spring and Fall On-board Customer Satisfaction Surveys.*

John Stesney, Project Manager

213.922.6893 | [stesneyj@metro.net](mailto:stesneyj@metro.net)

In 2018, Moore & Associates completed LA Metro's biannual customer satisfaction surveys. These on-board survey efforts involved the fielding and surveying of every bus and rail line operated by LA Metro. Our bilingual (English and Spanish) survey team collected more than 28,000 responses. All data collection was completed ahead of schedule and all survey response data was entered, cleaned, and submitted to LA Metro for review and approval at the completion of field collection. The size, scope, and expedited schedule of this project required our team to be flexible and proactive in order to meet the collection targets within the designated timeframe. This project continued Moore & Associates' partnership with Metro in meeting and exceeding survey data collection expectations.

From 2012 to 2015, Moore & Associates completed numerous on-board surveys of LA Metro's diverse, multilingual customer base. Without exception, these projects were completed on time and within budget while exceeding sample targets. Annual Customer





Satisfaction Surveys (2012, 2013, and 2014) and the Fall Customer Satisfaction Survey (FY 2015) exceeded sample targets in all cases.

In addition to the annual customer surveys, Moore & Associates completed a series of Quarterly Customer Satisfaction Surveys beginning in 2012. The purpose of these surveys was to determine ridership information, the demographic make-up of the ridership (including primary languages spoken), and customer perception. After successfully completing the engagements while also exceeding all survey data collection targets, Moore & Associates was again selected to conduct the Quarterly Customer Satisfaction Survey for 2013. For both quarterly surveys, the LA Metro coverage area was segregated into five sections, requiring 400 valid survey responses from each area. In actuality, we collected nearly 3,000 valid responses during each quarterly effort.

For all LA Metro surveys, the survey instrument was produced in 11 different languages, and each survey form was individually numbered for tracking and quality control purposes. Surveys were distributed via an intercept methodology to customers on-board LA Metro buses and trains throughout the greater Los Angeles area.

In Spring 2019 Moore & Associates completed the first wave of LA Metro's 2019 semiannual customer satisfaction surveys, collecting nearly 15,000 surveys.

*Key Staff: Jim Moore (project manager), Kathy Chambers (survey support), Erin Kenneally (survey development and data collection), Allison Moore (survey support).*





Nassau Inter-County Express

*Transit Survey Services, 2013 and 2016*

Jack Khzouz, CEO

516.296.4152 [jack.khzouz@transdev.com](mailto:jack.khzouz@transdev.com)



In 2013 and 2016, Moore & Associates conducted an onboard survey of the Nassau Inter-County Express (NICE) fixed-route bus service. The purpose of the surveys was to develop a profile of travel and demographic characteristics of NICE fixed-route customers to ensure compliance with federal Title VI reporting requirements. Moore & Associates designed the survey instrument to capture the following information:

- Travel patterns and behavior, including where people travel to, when they tend to travel, where they come from, how they access transit services, how they travel to their final destination, how frequently they use transit services, trip purpose, trip length, and other travel modes used.
- Rider demographics, including race, gender, ethnicity, English proficiency, income, vehicle availability, and other information which provided Veolia with a clear picture of who is using transit services.

To ensure NICE riders had an equal opportunity to participate in the survey, Moore & Associates utilized a professional translating service to offer the survey instrument in six non-English languages most commonly spoken in Nassau County (Spanish, Chinese, Italian, Persian, Korean, and French Creole).





All customers boarding the surveyed routes were offered the opportunity to take the survey. In 2013, a sample of 9,430 responses was collected. This sample ensured statistical accuracy of 95 percent and a  $\pm 1$  percent margin of error at the system level. Route-specific sample sizes ensured statistical accuracy of not less than 95 percent and a  $\pm 10$  percent margin of error (based on average daily ridership) at the individual level.

Given our success with the 2013 survey, Moore & Associates was again selected to conduct the 2016 rider survey. This effort resulted in a sample of 8,604 responses, again reflecting a statistical accuracy of 95 percent and a  $\pm 1$  percent margin of error at the system level. Route-specific sample sizes ensured statistical accuracy of not less than 95 percent and a  $\pm 10$  percent margin of error (based on average daily ridership) at the individual level.

Subsequent analysis of survey data by Moore & Associates in both 2016 and 2013 revealed no significant barriers arising from ethnicity, language, or income. Utilizing our in-house GIS capabilities, overlays of NICE routes against census block data for minority ethnicities, low-income populations, senior and youth populations, and transportation-disadvantaged populations (defined as households lacking access to a personal vehicle) were generated in support of NICE's Title VI plan.

Moore & Associates will be conducting NICE's 2019 survey in September 2019.

*Key Staff: Jim Moore (project manager), Kathy Chambers (survey development and data analysis), Erin Kenneally (survey planning and data collection), Allison Moore (field supervision).*





**City of Santa Clarita**

*Customer and Community Surveys and Ride Checks*

*(Part of Transportation Development Plan)*

Adrian Aguilar, Transit Manager

661.295.6305 | [aaguilar@santa-clarita.com](mailto:aaguilar@santa-clarita.com)



In 2012 and 2018, the City of Santa Clarita selected Moore & Associates to prepare its Transportation Development Plan (TDP). For both projects, the TDP served to update the service needs and service plans presented in the prior TDP. Substantial changes in the economy and continuing development throughout the Santa Clarita Valley necessitated a reassessment of demand as well as a renewed vision for transit in the SCV.

In 2012, the TDP required comprehensive data collection, including a 100-percent ridecheck with a concurrent customer intercept survey on-board all fixed-route and commuter runs, Dial-A-Ride survey, and community survey. Community survey methodologies included online, intercept, and collection at key community locations. A household mailer was used to drive residents to the online survey. Our project team collected nearly 3,600 surveys as part of the survey effort.

In 2018, data collection was similar. It included multiple survey efforts, including a local fixed-route rider survey, paratransit rider survey, community survey, and special survey of school tripper riders. Ridechecks on all Santa Clarita Transit routes were also included in order to provide on-time performance and boarding and alighting data that could assist in route and service planning.



Each engagement also included multiple rounds of community presentations and workshops, including stand-alone workshops, presentations to neighborhood councils and homeowner’s associations, and small-group discussions. All workshops included bilingual materials and offered interpretation in Spanish, the City’s only Title VI language. Rider and community surveys were also provided in both English in Spanish.

*Key Staff: Jim Moore (project manager), Kathy Chambers (data analysis and service planning), Erin Kenneally (survey development and data collection), Allison Moore (outreach and promotion).*

### City of Burbank



*2017 Rider, Community, and Employer Surveys*

Adam Emmer, Transportation Services Manager

818.238.5359 | [AEmmer@ci.burbank.ca.us](mailto:AEmmer@ci.burbank.ca.us)

Moore & Associates has partnered with the City in the promotion and administration of its community-based transit service since 1994. In doing so, we have helped change the face of transit in Burbank; often realizing double-digit ridership growth while establishing the City’s transit program as a vital element of the community.

In Fall 2017, as part of the City’s Comprehensive Operational Analysis (of its transit program), we conducted surveys of both transit riders and non-riders within the City of Burbank. We utilized a successful social media campaign to reach our sampling target. We also partnered with employers and the local TMO to reach employees that commute into Burbank from outside the service area. These survey efforts resulted in valuable data about travel





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patterns, commute behavior, perceptions of the current service, and barriers to transit use. The surveys were available online in English, with downloadable versions available in Armenian, Korean, Spanish, and Tagalog.

In Fall 2016 we conducted a 100-percent ride check of all BurbankBus routes in order to provide valuable data regarding ridership, boarding and alighting trends, and on-time performance. In Spring 2019 we again conducted surveys for the City.

In the last few years, we have conducted additional outreach activities on behalf of the City as part of its marketing program. These have included canvassing of businesses along BurbankBus route, direct mailers to employers and businesses, presentations, and participation in employer and community events.

*Key Staff: Jim Moore (project manager), Kathy Chambers (data analysis and service planning), Erin Kenneally (survey development and data collection), Allison Moore (marketing and promotion).*





## 2. Proposed Staffing and Organization

### Key Staff

Our proposed project team has successfully collaborated on several successful projects of similar scope and objectives (specifically, on-board origin/destination and customer satisfaction surveys and projects with creative outreach components) for clients such as Antelope Valley Transit Authority, City of Burbank, City of Fort Collins (CO), Greater Buffalo-Niagara Regional Transportation Council (NY), Long Beach Transit, Los Angeles County Metropolitan Transportation Authority, Monterey-Salinas Transit, Nassau (NY) Inter-County Express (NICE), and City of Santa Clarita. Implementation of service and marketing recommendations arising from our market research has consistently resulted in quantifiable benefits such as increased ridership, increased fare revenue, and growth in community support for client programs or services.

#### *Jim Moore—Project Manager*

We propose **Jim Moore**, our firm’s founder and managing partner, as project manager. Jim has more than 30 years of high-profile transportation experience, including surveys and other service evaluation and planning projects for more than 150 public transit organizations from coast-to-coast. Recent clients include Antelope

<b>JIM MOORE</b>
<b>Project Role</b>
<ul style="list-style-type: none"> <li>• Project management</li> <li>• Stakeholder engagement</li> <li>• Presentations</li> </ul>
<b>Office Location</b>
<ul style="list-style-type: none"> <li>• Valencia, CA</li> </ul>
<b>Tenure with Firm</b>
<ul style="list-style-type: none"> <li>• 28 years</li> </ul>





**JIM MOORE**

**Current Assignments**

- AMS planning (15%)
- Burbank on-call (10%)
- Fort Collins survey (10%)
- NICE survey (10%)
- SMAT SRTP (5%)
- Firm management (10%)

**Current Availability**

- Up to 40%

Valley Transit Authority, City of Burbank, City of Santa Clarita, City of Thousand Oaks, East Texas Council of Governments, Fairbanks North Star Borough (AK), Foothill Transit, Golden Empire Transit District, Greater Buffalo Niagara Regional Transportation Council (NY), Kitsap Transit (WA), Los Angeles County Metropolitan Transportation Authority, Maricopa Association of Governments (AZ), and Ventura County Transportation Commission. As project

manager, Jim Moore will guide our project team in all aspects and deliverables for the project. He will act as the direct link with OCTA staff and will be responsible for ensuring all project deliverables are both high quality and on-time.

Joining Jim on the project team will be [Kathy Chambers](#), [Erin Kenneally](#), and [Allison Moore](#).

***Kathy Chambers – Senior Associate***

For nearly fifteen years, Senior Associate [Kathy Chambers](#) has creatively deployed her analytical skills to develop market research activities that result in inclusive, effective, statistically valid datasets. She is an experienced project manager for clients throughout the western United States, taking the lead on market research, planning, and marketing projects; Title VI and TAM plans; and state-mandated performance audits. Kathy brings a sharp eye for detail

**KATHY CHAMBERS**

**Project Role**

- Survey development
- Facilitation guide and workshop development
- Data analysis

**Office Location**

- Valencia, CA

**Tenure with Firm**

- 13 years





**KATHY CHAMBERS**

**Current Assignments**

- AMS planning (15%)
- BCAG TDA audits (10%)
- Burbank on-call (5%)
- Calabasas Title VI (15%)
- Fresno Title VI (5%)
- SMAT SRTP (5%)
- SYVT service administration (15%)

**Current Availability**

- Up to 25%

along with big-picture knowledge of transit operations and customer mindsets, which ensures the right questions are crafted to collect the most valuable and relevant information.

As a market researcher, Kathy creates survey instruments that capture the most effective data and develops survey plans that ensure participation from a broad representation of the target audience. She also provides thorough analysis of data to

provide insightful and easy-to-understand reports, including customer personas, key findings, trend analysis, and peer comparisons.

Kathy has developed survey instruments, analyzed survey data, and prepared comprehensive and insightful reports for clients including City of Burbank, City of Santa Clarita, Golden Empire Transit District, Greater Buffalo-Niagara Regional Transportation Council (NY), Nassau (NY) Inter-County Express, and Ventura County Transportation Commission.

***Erin Kenneally—Market Research Manager***

Market Research Manager [Erin Kenneally](#) has successfully led bilingual market research activities and data collection efforts resulting in statistically valid, easily understood data for public transportation clients from coast to coast. She not only actively plans our survey efforts (including sampling plans, surveyor schedules, and training materials), but she is also our in-field

**ERIN KENNEALLY**

**Project Role**

- Survey development
- Survey planning and coordination
- Outreach coordination
- Spanish interpretation

**Office Location**

- Valencia, CA

**Tenure with Firm**

- 5 years





**ERIN KENNEALLY**

**Current Assignments**

- Calabasas Title VI (5%)
- Foothill Transit mystery shopper (5%)
- Fort Collins survey (15%)
- LA Metro station evaluation (10%)
- LA Metro survey (15%)
- Long Beach Transit survey and mystery shopper (15%)
- NICE survey (15%)

**Current Availability**

- Up to 20% through December 2019
- Up to 60% after December 2019

leader. She understands how to efficiently deploy surveyors to effectively exceed sample targets. She is fluent in Spanish, helping Moore & Associates collect valuable input from limited-English proficiency populations.

Erin’s client experience includes the Antelope Valley Transit Authority, City of Burbank, City of Fort Collins (CO), City of Thousand Oaks, Detroit Transportation Corporation (MI), Foothill Transit, Long Beach Transit, Los Angeles County Metropolitan Transportation Authority, Nassau Inter-County Express (NY), Greater Buffalo-Niagara Regional Transportation Council (NY), and

VIA Metropolitan Transit (TX).

**Allison Moore – Marketing Practice Leader**

Allison brings 11 years of public transportation experience to the project team, including hands-on experience with the City of Burbank, City of Irvine, City of Modesto, Humboldt County Association of Governments, Northern Arizona Intergovernmental Public Transportation Authority, and Ventura County Transportation Commission. She has led marketing plan development as well as marketing, advertising, public communications, and presentation materials for clients

**ALLISON MOORE**

**Project Role**

- Promotional materials
- Outreach assistance
- Survey support

**Office Location**

- Valencia, CA

**Tenure with Firm**

- 11 years





**ALLISON MOORE**

**Current Assignments**

- Burbank marketing (5%)
- GET marketing (20%)
- Modesto marketing (15%)
- NAIPTA marketing (10%)
- SYVT marketing (15%)
- Firm management (10%)

**Current Availability**

- Up to 20%

throughout the western United States including the Antelope Valley Transit Authority, City of Lompoc Transit, City of Manteca, City of Santa Clarita, City of Thousand Oaks, County of Merced, East Texas Council of Governments, Golden Empire Transit District, Intercity Transit (WA), Kern Transit, Livermore Amador Valley Transit Authority, Longview Transit (TX), and Santa Ynez Valley Transit.

Resumes are provided in Appendix A.

**Staffing Plan**

The following chart illustrates hours by task for our proposed project personnel.

	Task 1	Task 2	Task 3	Task 4	Task 5	Task 6	Total
PROJECT MANAGER	16	16	160	160	40	40	<b>432</b>
SENIOR ASSOCIATE	8	24	16	16	40	40	<b>144</b>
MARKET RESEARCH MANAGER	8	24	394	144	32	40	<b>642</b>
MARKETING PRACTICE LEADER	0	0	170	162	0	8	<b>340</b>
FIELD SUPERVIORS/EVENT STAFF	0	0	969	0	0	0	<b>969</b>
ADMIN SUPPORT	0	8	25	48	8	0	<b>89</b>

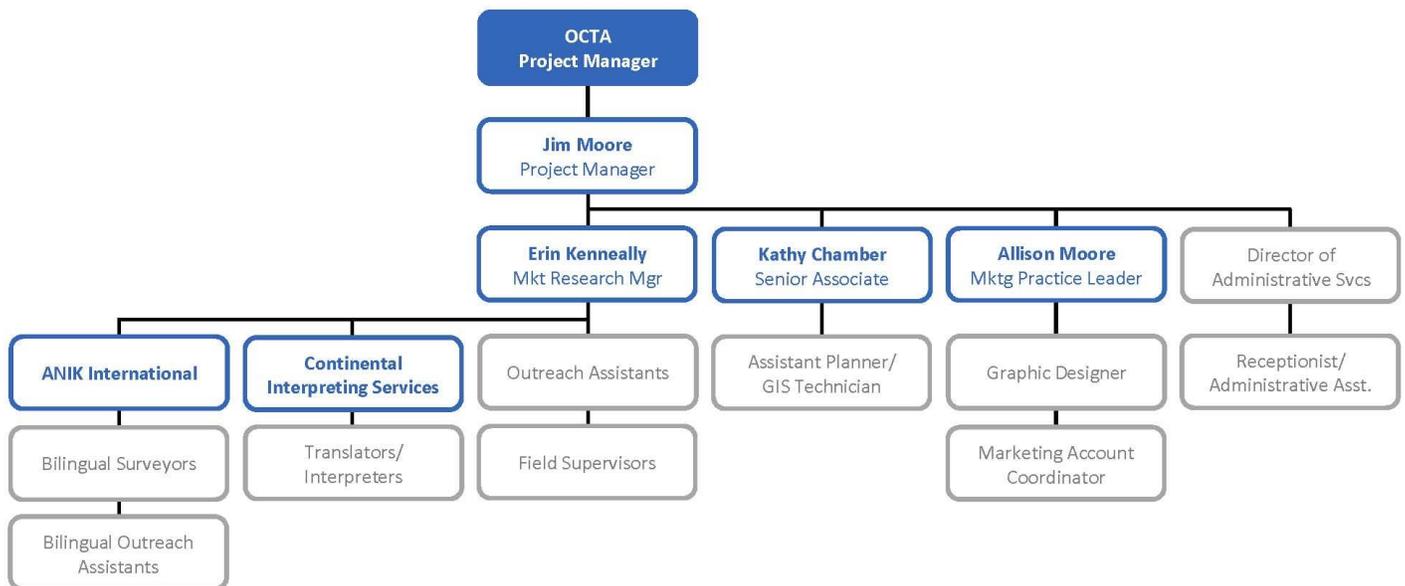




Moore & Associates is confident in its ability to exceed expectations for performance in this engagement. As such, we offer OCTA four guarantees:

- The team identified herein will perform all work and fulfill all roles as described within the proposed Scope of Work.
- Key personnel will be available to the extent proposed for the duration of the project.
- No person designated as “key” to the project shall be removed or replaced without prior written concurrence of OCTA.
- Project milestones agreed to during project initiation will be maintained.

### Organizational Chart



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## 3. Work Plan

### Project Understanding

The Orange County Transportation Authority (OCTA) is not only responsible for providing public bus transportation via countywide bus service but is also responsible for a variety of other transportation-related services including the 91 Express Lanes, three Metrolink lines in the OC, working with Caltrans and local jurisdictions to improve freeways, streets, and roads, and developing and implementing short- and long-term transportation plans.

While OCTA regularly collects data and conducts studies regarding the transportation needs of Orange County residents, these studies typically do not focus on the specific needs of the county's ethnic populations. The purpose of the Transportation Needs Assessment (TNA) is to provide more in-depth insight into the transportation needs of Orange County residents, with a particular focus on ethnic and diverse communities. The data collected during and recommendations arising from the TNA will be used to guide future planning decisions and engagement activities.

In order to collect the desired data from the target populations, the selected consultant will conduct an onboard transit rider survey, a community survey of both existing transit riders and non-riders, and a stakeholder survey of community leaders. The TNA also includes facilitation and/or participation in an extensive series of community outreach events targeting an array of cultural/ethnic populations throughout Orange County.





A solid foundation of quality, current, and statistically valid data regarding various transportation needs, travel patterns, perceived barriers to transit use, existing customer satisfaction and perceptions, and issues and challenges unique to specific ethnic communities will allow OCTA to identify program strengths and weaknesses including potential gaps in service, while developing strategies for enhancing transportation, thereby improving mobility for persons who live and/or work throughout Orange County.

### Quality Assurance Plan

Quality assurance is an ongoing process, comprised of two primary principles: “Fit for purpose” and “Right the first time.” For each project, we ensure the deliverables are appropriate for the scope of work (in other words, they address core project objectives). Effective communication at every step reduces the likelihood of mistakes, as we frequently compare the client’s expectations to our project methodology. Constant attention to this process across all clients allows Moore & Associates’ staff to apply lessons learned to each project as well as our practice as a whole.

As a professional consulting firm, our reputation depends upon the quality of our work. Consequently, quality control is extremely important to us. Project deliverables are reviewed by qualified staff not directly assigned to the project. This allows for review by a “fresh set of eyes” so that the product received by the client has been effectively vetted. Other quality control measures include using proven processes for data collection, data processing, reporting, and invoicing.



## Project Management

Effective project management is the key to a successful project outcome. It ensures the four constraints of scope, schedule, cost, and quality are kept in balance throughout the course of the engagement. Jim Moore, our proposed project manager, will be responsible for planning, organizing, and controlling the resources, processes, and protocols necessary for achieving a project's specific goals.

To support our project management approach, we utilize Basecamp, a web-based project collaboration tool. Basecamp allows us to monitor task progress in real-time, assign resources effectively, and keep tabs on the project schedule. It ensures transparent communication between our project team and the client so that there are no surprises. This web-based access is available to both the project team and client partners and requires no special software.



Our project manager will remain accountable throughout the entire project to ensure OCTA is kept up to date on all key aspects of the project. Our project team will meet frequently to discuss current activities and identify necessary actions. Upon identifying priority tasks, we will update the project Basecamp account, providing the project team real-time access to strategies for achieving the work plan.

## Scope of Work

Herein we have summarized our proposed methodology for this project, which we believe will be the most effective and efficient path for addressing the project objectives.





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## **Task 1: Overall Strategy and Work Plan**

Task 1 sets the stage for successful data collection and analysis. Upon receipt of a Notice to Proceed, our project manager will coordinate and facilitate an on-site project kick-off meeting with OCTA. The goals of the meeting are confirm project goals, finalize fielding specifics (survey periods, etc.) and create a definitive project timeline. Following the project initiation meeting Moore & Associates will provide meeting minutes as well as a list of action items including a comprehensive listing of any data we will need to obtain from OCTA to effectively deploy the project.

Following the project kick-off meeting, we will develop a Project Plan to guide project. The Project Plan will be reflective of our “best practices” regarding research methodology, sampling, development of survey instruments and facilitation guides, data collection and analysis, community and stakeholder outreach, and reporting/presentations so as to best meet the objectives of the TNA. The Project Plan will be submitted to OCTA’s project manager for review and finalization. Once the Plan has been approved, we will move ahead with the tasks of the TNA.

Given the goal of this project to reach as many individuals as possible, including a representative sample of backgrounds/ethnic groups from locations throughout the county, our proposed project methodologies include activities designed to remove barriers to survey participation, as well as a diverse data collection effort that will encourage participation from people of all ethnicities, ages, income levels, and demographics.

This project requires a creative methodology to thoroughly engage a representative sample of such a vast service area. To this end, we propose a multi-pronged survey effort designed to reach Orange County residents where they live, work, shop, and play.



Our Project Plan will also mitigate barriers to survey participation by including strategies to reduce response bias, address language barriers, and reduce refusal rates. These include:

- Providing a variety of opportunities and methodologies for survey completion.
- Utilizing bilingual surveyors and offering bilingual survey instruments, both in print and online.
- Offering one-on-one assistance in survey completion to individuals who may have difficulty reading or writing.
- Reaching out to community service organizations who can help us distribute the survey to individuals from population groups who historically may be less likely to participate in a community survey.
- Utilizing various incentives for survey completion.

We believe our proposed approach will provide current, accurate, easy-to-understand data to inform service planning and marketing decisions for OCTA.

<b>Task 1 Deliverable</b>
Develop, submit, and manage Project Plan

**Task 2: Develop Survey Instruments and Facilitation Guides**

Our project team will work with OCTA to develop customized data collection, discussion, and presentation materials for use during the project. Moore & Associates proposes developing, at a minimum, three survey instruments, one or more focus group facilitation guide, and a variety of presentations.



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*Survey Instruments*

While the RFP specified two survey instruments (public-focused and stakeholder), we believe it would be more effective to utilize three survey instruments. This will enable us to separate the public-focused survey into two distinct audiences (current transit rider and community), which allows for more trip-specific information to be collected from riders. The community survey will include questions for both riders and non-riders, including some of the same questions as for riders, but will be tailored to a respondent that is not currently onboard or waiting for a bus.

1. **Rider Survey:** The rider survey instrument will be designed to capture (at a minimum) the following information:
  - Rider demographics, including race, gender, ethnicity, English proficiency, household income, and vehicle availability.
  - Travel patterns and behavior, including origin/destination information, why OCTA riders select transit, how they typically access transit services, how they reach their final destination, how frequently they ride, what fare media they use, and incidence of transfer.
2. **Community Survey:** The community survey will be designed to collect information from all Orange County residents both existing transit riders as well as non-riders. Whenever possible, the same questions will be used in both surveys allowing for comparisons between populations.
3. **Stakeholder Survey:** The stakeholder survey will be tailored to community leaders or organizational representatives who speak for members of a community or organization rather than only themselves.

Drawing upon “lessons learned” during previous successful survey efforts, our project team will design the survey instruments to collect the data required by OCTA while being as inviting and inclusive as possible. A streamlined instrument reduces the number of potential respondents who decline to provide feedback. Our typical design strategy is to include the questions most important to our clients at the beginning of the instrument, thereby helping ensure OCTA obtains the data it needs most. All surveys will be designed to be completed in 10 minutes or less.

When creating any survey instrument, we seek to avoid biased words and phrases, as well as double-barreled questions to which a respondent agrees with one part of the question yet not the other. Therefore, we recommend utilizing a combination of four types of questions: Forced-Choice, Multiple-Answer, Combination, and Open-Ended. (See Figure 1.) For each survey, we will post to Basecamp a list of proposed questions and potential response options for the project team’s review and comment.

Figure 1. Proposed types of survey questions

Question Type	Example
Forced-Choice: Closed-ended single-response questions used to gather general information	“Select only one response”
Multiple-Answer: Closed-ended questions with the option to select multiple responses	“Select all responses that apply”
Combination: Forced-Choice or Multiple-Answer questions that include an open-ended option	“Other (specify)”
Open-Ended: No response options provided, only space for an unguided response	“Tell us what you think”





Once the survey has been approved by OCTA's project manager, Continental Interpreting will translate the instrument into the six most common languages spoken by limited-English proficient (LEP) residents of Orange County: Spanish, Chinese (Mandarin), Vietnamese, Persian (Farsi), Korean, and Arabic. We will work with subcontractor Continental Interpreting to prepare linguistically accurate professional translations that also reflect the cultural nuances of these languages.

During all in-person data collection, we utilize "I Speak" cards to help surveyors identify in which language the potential respondent would like to take the survey (see Figure 2). Each surveyor is equipped with a color-coded language card that presents the phrase "I would like to take the survey in..." in all the represented languages. The cards are color-coded to match the paper survey instruments to mitigate any confusion. We have used this strategy effectively during recent survey efforts for the Los Angeles County Metropolitan Transportation Authority (LA Metro). We printed color-coded instruments front and back for all languages (e.g., Chinese on one side of a green instrument and Korean on the other) and equipped all surveyors with the language card. This resulted in more than 200 foreign language responses. We believe utilizing this methodology for the proposed TNA data collection will ensure that all residents have an opportunity to participate in the surveys even if they encounter a surveyor who does not speak their language.

For the community survey, we anticipate administering the surveys using an online (web-based) option as well as in person using physical (paper) instruments. The paper instruments will be utilized during in-person (intercept) surveying and will be distributed at high-traffic locations such as libraries, shopping malls, etc. and at community outreach events.



Figure 2. LA Metro survey language identification card

<b>METRO 2019 Customer Satisfaction Survey</b>
<b>I would like to take the survey in . . .</b>
Ես ցանկանում եմ հարցունել անցնել հայերեն լեզվով (ARMENIAN)
Я хочу заполнить опросник на русском языке (RUSSIAN)
我想要填寫中文問卷 (CHINESE)
私はこのアンケートを日本語で行いたいです (JAPANESE)
한국어로 설문조사를 작성하길 원합니다. (KOREAN)
Gusto kung kunin ang survey sa wikang Tagalog (TAGALOG)
من می خواهم این بررسی را در فارسی انجام دهم (FARSI)
ฉันอยากกรอกแบบสำรวจเป็นภาษาไทย (THAI)
Tôi muốn tham gia làm khảo sát bằng tiếng Việt (VIETNAMESE)
ខ្ញុំចង់ធ្វើការស្ទង់មតិ៖ ជាភាសាខ្មែរ (CAMBODIAN)

The web-based survey will be developed using the Survey Monkey platform. The online version of the survey will utilize skip logic to enable participants to move through the survey faster depending on their answers to particular questions (such as skipping the rider-specific questions on the community survey when the respondent indicates being a non-rider). Survey Monkey generates a survey URL that can be linked to websites, emails, and social media accounts. We envision utilizing a unique URL that



links to a stand-alone landing page on which links to each non-English language survey version is located.

Survey Monkey's capabilities include the prevention of users from completing multiple surveys, presentation of results in an online format, and the simple exportation of data into other programs including SPSS and MS Excel. Most importantly, Survey Monkey employs multiple layers of security to make sure each account and data set is private and secure.

If desired and/or appropriate, Survey Monkey can also be used to field an online version of the stakeholder survey as well.

### *Focus Group Facilitation Guides*

Focus groups are an important part of this project, as they provide the opportunity to drill down about issues and challenges specific to one ethnic community. Because a focus group is a face-to-face interaction, the moderator can ask follow up questions to clarify or expand on a participant's input. While participation in focus groups is far more modest than surveys, it has the ability to be much more detailed.

A general facilitation guide will be developed to guide discussions during each focus group. Once the general guide has been completed, additional content will be developed to address issues specific to an ethnic community or geographic location. All materials will be translated into the six targeted languages prior to conducting any focus groups.





*Presentations*

One or more general presentations will be developed for use at meetings, workshops, and events. These presentations may take the format of a formal MS PowerPoint presentation (to be used at a meeting or stand-alone workshop) or a series of talking points (that could be used in a more information setting, such as an existing community event). All presentations will be translated into the six targeted languages. All accompanying materials (comment cards, signage, etc.) will also be translated.

Task 2 Deliverables
Survey instruments (rider, community, and stakeholder)
Group meeting facilitation guides
Presentations

**Task 3: Administer the Survey and Facilitate Group Meetings**

*Rider Survey*

We propose utilizing a stratified random sampling method to collect data that accurately represents a broad spectrum of riders on all OCTA routes. Formal sampling targets will be calculated for each route using actual recent ridership data.

We anticipate a total sample size of no less than 12,000 valid responses. This sampling target will ensure a confidence level of at least 95 percent and a ±1 percent margin of error at the system level. Further, we propose to collect sufficient surveys to ensure individual route sampling targets achieve a confidence level of not less than 95 percent and no greater than a ±10 percent margin of error for all routes with more than 1,000 daily boardings.



Given OCTA's annual ridership, we believe a sample size of 12,000 surveys is appropriate. All survey will be printed with a unique barcode and survey number which will allow for tracking the route, time, and date each survey is collected.

### Rider Survey Staffing Plan

Upon receipt of ridership data and schedule information, we will prepare a detailed staffing plan, identifying the number of surveyors and field supervisors needed for each phase of the project.

Moore & Associates will continue its successful partnership with ANIK International, a partnership that has resulted in successful outcomes for LA Metro as well as for Foothill Transit, El Monte Transit, and Santa Clarita Transit. We have budgeted incentives to encourage surveyor performance for the duration of the project. Erin Kenneally will work with ANIK to oversee the recruitment, training, and supervision of data collectors/surveyors.

Our base criteria for selection of surveyors includes the following:

- Fluency in English (written and oral),
- Conversant in Spanish or one of the five other identified non-English languages,
- Prior experience in surveying, customer service, or retail (preferred),
- Ability to read and understand a bus schedule,
- "Common sense" problem solving capabilities,
- Ability to conform with professional appearance standards,
- Working timepiece,
- Physical ability to board and ride the bus unassisted,



- Punctuality (arrive 15 minutes before the shift start), and
- Reliable transportation.

Prior to fielding the onboard surveys, our project team will conduct mandatory training sessions at a location agreed upon by OCTA staff. The training will consist of an overview of project goals, familiarization with the survey instrument, discussion of recommended approach/practices, use of the language card, instruction regarding appropriate attire and conduct, an overview of proper survey etiquette, role-playing of the survey process, safety, and performance expectations. Data collectors/surveyors will be instructed on survey “best practices” to ensure all project standards are maintained and survey participation is as broad as possible. Our project team supervisors will provide direct assistance with all training aspects, including coordinating with ANIK International, and development of training materials.

Erin Kenneally will be responsible for coordinating with designated OCTA staff to ensure the necessary permissions are obtained to conduct training and data collection.

Surveyors will be identified by both a reflective vest and an identity badge on a neck lanyard. Prior to boarding the assigned vehicle, each surveyor will be provided with a bag containing survey forms, a laminated language card, a control sheet, pens/pencils, clipboards, a system map, a line-specific map and schedule, and their surveyor “paddle.” All surveyors will also be provided with the cell phone contact for our field supervisors, who will be conducting spot-checks of surveyor performance as a quality control measure.





Surveyors will offer the survey to all customers boarding the vehicle while also making themselves available to answer questions regarding the survey. Customers who do not speak English will be offered the language card and given the opportunity to take the survey in another language.

Our field supervisors continually monitor data collection, including on-site review of survey instruments to ensure they meet OCTA’s standard of completeness. This continual monitoring process ensures that sample targets for each line are met. We also monitor progress on a daily basis, allowing us to adjust efforts and resources as needed to ensure project success.

Community Survey and Outreach

Moore & Associates believes an appropriate sample size for the Community survey is 3,500 responses including a minimum of 500 surveys completed by individuals who speak each of the target languages (Spanish, Chinese, Vietnamese, Korean, Arabic, or Farsi), even if they speak English very well or take the survey in English. This will ensure a statistically valid sample from each of the threshold languages.

Community Survey Proposed Sampling Quotas	
Language	Quantity
Arabic	500
Chinese (Mandarin)	500
Farsi/Persian	500
Korean	500
Spanish	500
Vietnamese	500
All other languages (including English only)	500
<b>Total</b>	<b>3,500</b>

This project requires creativity to reach a representative sample of individuals from each community and ethnic group in the Orange County service area. We believe the most effective



and cost-efficient methodology involves a three-phased approach to reaching individuals throughout the area:

- Electronic distribution, supplemented with paper distribution at libraries, government offices, and other public locations;
- Intercept surveys at key activity centers throughout the service area; and
- Community outreach events.

We do not recommend using a telephone methodology for the community survey. It has been our experience that, while the customer base continues to evolve, the use of phone polling in general is becoming decreasingly effective. This change is a product of the growing use of “do-not-call” lists, caller identification, elimination of traditional land lines/exclusive use of cell phones, and unlisted phone numbers. Additionally, there is no way to know if a given phone number belongs to a person in the desired ethnic or language group, further complicating phone polling.

### *Phase I: Electronic distribution and distribution at public locations*

We believe electronic distribution to be an effective first wave in the survey effort, utilizing opt-in government alert services as well as social media to distribute the survey link to individuals throughout the service area.





In our experience, multiple rounds of internet outreach can help boost survey participation numbers, as a second notice can remind individuals who had intended to take the survey but had put it off in favor of other activities.

To help reach individuals who may not be technically savvy, during the first wave of surveying we will distribute paper copies of the survey form (with a postage-paid return envelope) at high-traffic public locations including libraries, city halls, and other locations frequented by a broad range of community members. Our award-winning in-house marketing team, led by Allison Moore, will design promotional materials such as posters and flyers to draw attention to the surveys.

We will also distribute the survey form (either electronic or paper) to community service organizations representing populations who typically are less likely to participate in community survey efforts and/or to have Internet access. The idea is to distribute the survey via individuals that community members already trust. Examples of such organizations include workforce organizations, food pantries, cultural organizations, and English-as-second language programs. We believe distribution via these channels will generate strong response and also generate critical awareness of the community survey effort.

*Phase II: Intercept methodology*

Our next phase of surveying will involve utilizing intercept methodology, deploying members of our market research team to distribute surveys and conduct survey interviews at high-traffic locations throughout the service area.



Response rates for community surveys are generally lower than for onboard surveys, as riders can be considered a “captive” survey audience while the general public may prioritize other activities over taking the time to complete a survey. To mitigate this, when conducting community surveys we try to conduct surveying at community activity centers where individuals feel they may have time to complete a survey.

When choosing locations for intercept surveys, we will be mindful of the successes of the online and community survey distribution, and can if necessary target areas where response rate has been lower. Bilingual surveyors will be used in ethnic communities to facilitate survey completion.

### *Phase III: Community outreach*

For this phase we envision three types of community outreach:

- Community workshops,
- Focus groups, and
- Participation in existing community events such as neighborhood fairs.

Our goal will be to ensure proactive public involvement and consensus throughout the entire project. As specified in the RFP we will plan a minimum of two workshops for each “threshold language” and up to 30 additional events as needed. We anticipate the 30 additional events to be a combination of focus groups, community events, and stand-alone meetings or workshops. We will work with OCTA to determine ideal times and locations. There is no better way to assess the



opinions of the community than to provide a channel for candid discussion and immediate feedback. Interpretation and bilingual materials would be available at all sessions.

Focus groups provide a unique opportunity to meet with members of the community in small groups to obtain more in-depth feedback. We anticipate focus group sessions to be highly targeted, either by language, ethnicity, geography, or participant type (rider, non-rider, employer, community stakeholder, etc.). This will allow for a greater level of engagement by participants.

Focus group recruitment will be conducted in several ways. In most projects where focus groups are part of a multi-pronged outreach effort, we include a question as to the respondent's interest in participating in a focus group on the rider and community surveys. This also allows the participant to provide their contact information. We also work within any established databases the operator may maintain as well as with representative community organizations.

Moore & Associates also has experience representing its clients at community events (such as fairs and chamber of commerce meeting) as well as at special events such as program milestones or brand launches. We handle all aspects of community outreach, from coordinating the design and purchase of promotional items to completing all registration paperwork and





staffing the events. We provide overall guidance as well as graphic design and promotional support. By partnering with both ANIK International and Continental Interpreting, we will ensure that events are appropriately staffed with interpreters/translators whenever needed.

Our repeated outreach campaigns have not only resulted in valuable feedback from the community but also built up goodwill and credibility, and provided access to thousands of potential riders.

### Outreach to Community Stakeholders

In order to gain additional perspective regarding the mobility needs within the service area, it is critical to include community stakeholders including key employers, social services providers, learning institutions, and other community groups (including those representing ethnic groups, seniors, youth, and persons with disabilities). We propose both face-to-face outreach with key employers and business leaders as well as the implementation of a stakeholder survey. Face-to-face outreach will include inviting these stakeholders to all community events.

We have found a stakeholder survey to be extremely useful in identifying mobility needs and priorities of stakeholder employees, customers, students, and clientele. These surveys may be conducted online, via direct mail, or via a telephone interview.

All stakeholders will be asked to provide information about the ethnic groups they serve, languages their staff and/or clients may speak, and staff/client travel modes and patterns. Employers will be queried regarding hours of operation, employee shift times, and current staffing levels, as well as interest in subsidized passes or other financial assistance to encourage ridership. Stakeholders such as healthcare providers, educational institutions, and





social services organizations will be surveyed to determine what needs exist among the populations they serve, what services are currently being utilized to meet these needs, and if any gaps exist. The survey will help identify times of peak demand as well as underserved mobility needs. A special focus will be on identifying barriers to the use of existing transportation programs.

Our in-house Marketing Team will prepare all necessary materials for the advertisement and facilitation of community workshops, as well as any necessary follow-up communication with the public. We will also develop multilingual posters and flyers to be distributed throughout local community centers such as libraries, public buildings, and recreation centers, and develop other bilingual promotional artwork such as car cards, web graphics, and eblasts.

Task 3 Deliverables
Facilitate and capture feedback from community town halls, forums, faith-based group meetings, etc.
Conduct all online and in-person surveys in the threshold languages in order to ensure reaching the necessary sample size for each
Organize and lead focus groups
Assist with outreach and promotion to ensure sufficient numbers of survey respondents
Facilitate and capture feedback of focus groups and group meetings
Distribute incentive upon receipt of completed survey after focus group or group
Train staff and volunteers in survey administration and data collection methods
Conduct stakeholder surveys and interviews

**Task 4: Data Collection and Analysis**

Before data entry begins, Moore & Associates will prepare a Statistical Package for the Social Sciences (SPSS) database for each survey to facilitate data compilation and analysis. SPSS software is one of the most commonly used software platforms for data analysis. All survey data will be entered using trained data entry personnel. Erin Kenneally will monitor the data entry process, reviewing data entry work and conducting spot-checks throughout the process.





Data cleaning will be undertaken by trained personnel following completion of data entry. Any open-ended questions and responses to questions that include “other” as a choice will be reviewed for grammar and accuracy. When appropriate, responses will be cleaned for consistency and/or categorized with similar responses during analysis. All foreign language comments will be translated into English. An Excel spreadsheet of all data will be provided to OCTA’s project manager after data collection and cleaning is complete.

One of the key benefits of using SPSS is the ability to draw relationships (i.e., cross-tabulations) between individual data sets. Once all data has been collected and entered we will run simple frequencies and identify, through discussions with OCTA’s project manager, possible data cross-tabulations. Data cross-tabulations allow comparisons between survey responses that can provide additional insight into customer profiles, travel patterns, perceptions of service, and demographics.

Data frequencies and cross-tabulations will be used to summarize the survey findings. We anticipate looking specifically at key demographics, travel patterns, transportation needs, barriers to use, technology, and satisfaction with respect to individual language/ethnic groups in addition to the sample as a whole. We will also aggregate the transportation needs identified through all forms of outreach across the individual languages/ethnic groups.

Task 4 Deliverables
Collection and analysis of survey data, including but not limited to demographic and geographic cross-tabulations
Work with OCTA staff to determine appropriate sample size and target for surveys
Develop appropriate scripts and translate
Provide basic cleaning, scanning, and editing of all data in preparation for reporting results
Review other relevant countywide data sources and synthesize applicable information into the TNA
Provide raw data file to OCTA





Task 5: Transportation Needs Assessment Report, Executive Summary and Presentations

Our project report will synthesize the deliverables arising from the previous tasks. The report will begin with an Executive Summary providing a brief overview of the steps involved in conducting the surveys and data analysis, as well as the key findings that resulted from the surveys.

Following the Executive Summary, the report will present a detailed summary of our findings, including descriptions of key trends. While the prior task analyzed individual data-sets, Task 5 will aggregate the data across data-sets so as to create a comprehensive view of transportation needs as a whole and specific to individual languages/ethnic groups. Data from riders, non-riders, focus group participants, and stakeholders will be incorporated into this analysis. We will then develop recommendations specific to those findings that can be used in future service development, marketing, and community engagement activities.

In addition to describing our key findings, the report will also provide more detailed documentation of the survey instrument development, administration, data entry, data cleaning, as well as the analytical methods we used to arrive at the key findings.

Upon completion, the draft report will be submitted to OCTA for review and approval. Any comments from OCTA staff will be incorporated into the final project report.

Task 5 Deliverables
Electronic and hard copy of draft report to include all the sections specified in the RFP
Electronic and hard copy of the final report capturing OCTA project team comments





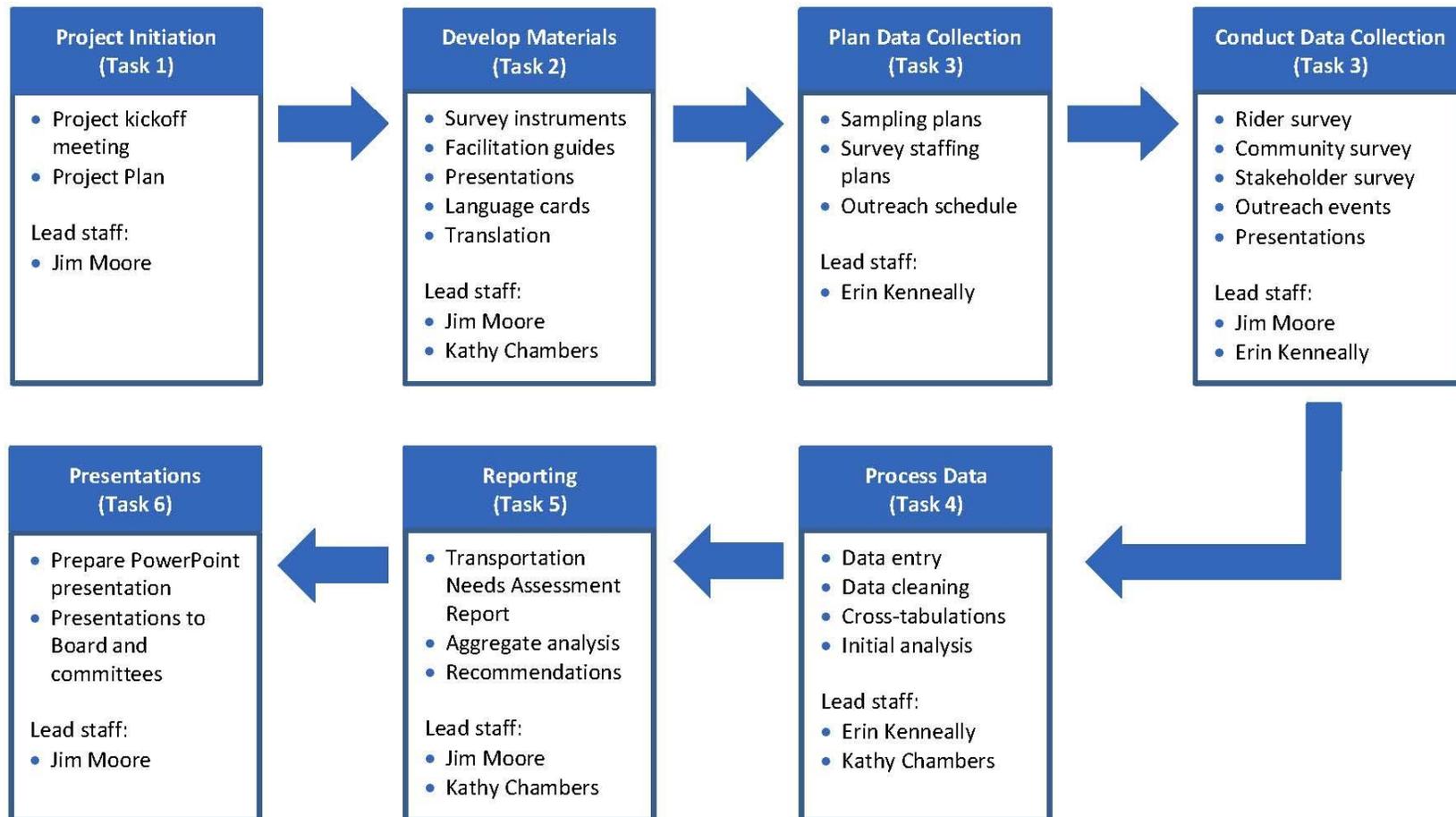
Task 6: Present Results of Analysis

Upon completion of the report, our project manager will conduct a PowerPoint presentation of the final report to the OCTA Board of Directors, the Transit Committee, the Legislative and Communications Committee, the Citizens Advisory Committee, and the Special Needs Advisory Committee. In addition to describing our key findings, the presentation will also provide documentation of the survey instruments development, administration, sampling methodology, data entry, data cleaning, as well as the analytical methods we used to arrive at our key findings. The presentation will include detailed assessment of survey findings, highlighting the most important aspects as well as any recommendations.

Task 6 Deliverables
Create PowerPoint with key findings and recommendations
Present findings to the OCTA Board of Directors and two public committees including the Transit Committee and the Legislative and Communications Committee
Present findings to OCTA's public committees including the Citizens Advisory Committee and the Special Needs Advisory Committee



## Sequential Outline of Project Activities





# Project Schedule

TASKS	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER
	4 11 18 25	2 9 16 23 30	6 13 20 27	3 10 17 24	2 9 16 23 30	6 13 20 27	4 11 18 25	1 8 15 22 29	6 13 20 27	3 10 17 24 31	7 14 21 28
Task 1: Overall Strategy and Work Plan*	█	█									
Task 2: Develop Survey Instruments and Facilitation Guides		█	█								
Task 3: Administer the Survey and Facilitate Group Meetings			█	█	█	█	█				
Task 4: Data Collection and Analysis						█	█	█			
Task 5: Transportation Needs Assessment Report, Executive Summary and Presentations								█	█	█	
Task 6: Present Results of Analysis**									█	█	█
<b>PROJECT MILESTONES</b>											
<i>Rider Survey</i>			█	█	█	█					
<i>Community Survey and Events/Meetings</i>			█	█	█	█	█				

\* Assumes November 2019 project start

\*\* We will be available for presentations for Task 6 throughout the remainder of the contract





## 4. Cost Proposal





RFP 9-1505  
EXHIBIT B

PRICE SUMMARY SHEET

REQUEST FOR PROPOSALS (RFP) 9-1505

Enter below the proposed price for the tasks described in the Scope of Work, Exhibit A. Prices shall include direct costs, indirect costs, profits, and tax. The Authority's intention is to award a firm-fixed price contract.

Tasks	Description	Firm-Fixed Price
1	Overall Strategy and Work Plan	\$ <u>3,0402.72</u>
2	Develop Survey Instruments and Facilitation Guides	\$ <u>10,674.05</u>
3	Administer the Survey and Facilitate Group Meetings (\$ <u>See Attached</u> per event)****	\$ <u>329,750.64</u>
4	Data Collection and Analysis	\$ <u>60,286.10</u>
5	Transportation Needs Assessment Report, Executive Summary and Presentations	\$ <u>13,364.72</u>
6	Present Results of Analysis	\$ <u>9,078.84</u>
<b>Total Firm-Fixed Price</b>		\$ <u>426,557.08</u>

\*\*\*\*Per Task 3, part b of the Scope of Work under Exhibit A, for budgetary purposes and submission of a firm fixed price please assume at least two (2) community events for each threshold language and up to 30 additional events as-needed. In addition, please provide a per event cost for as-needed events.

\*\*\*\*Moore & Associates believes not all events are created equal. Therefore, we have provided per-event pricing for three different event types: focus groups, stand-alone community workshops, and pre-existing community events. Our firm fixed offer assumes twelve focus groups, twelve workshops, and eighteen existing events. Event pricing assumes only one Language (other than English) per event.

Focus Group	\$4,650
Workshop	\$3,550
Existing Event	\$2,750





# Transportation Needs Assessment

Orange County Transportation Authority

Proposal

## RFP 9-1505 EXHIBIT B

The undersigned, upon acceptance, agrees to provide the service in accordance with the terms, conditions, and requirements as contained in RFP 9-1505 and the supporting documents for all prices proposed.

- 
1. I acknowledge receipt of RFP 9-1505 and Addenda No.(s) 1
  2. This offer shall remain firm for 120 days from the date of proposal  
(Minimum 120)

COMPANY NAME	<u>Moore &amp; Associates, Inc</u>
ADDRESS	<u>25115 Ave Stanford, #B-215, Valencia CA 91355</u>
TELEPHONE	<u>661-253-1277</u>
SIGNATURE OF PERSON AUTHORIZED TO BIND OFFEROR	<u><i>Stephanie Roberts</i></u>
SIGNATURE'S NAME AND TITLE	<u>Stephanie Roberts</u>
DATE SIGNED	<u>August 16, 2019</u>





# Appendix A

## Resumes



**JIM MOORE  
PROJECT MANAGER**



**Project Role**

- Project management
- Stakeholder engagement
- Service development

**Education**

- Bachelor of Science, Political Science, California State University, Fullerton

**Professional Involvement**

- Association for Commuter Transportation (ACT)
- California Association for Coordinated Transportation (member, marketing consultant, and presenter)
- Community Transportation Association of America (CTAA)

**OVERVIEW**

Jim possesses more than 30 years of public transit experience gained in both the public and private sectors. Jim founded Moore & Associates in 1991, and has spent the past nearly 30 years assisting public transportation organizations with their market research, planning, administrative, and marketing needs.

**RELEVANT EXPERIENCE**

**LOS ANGELES COUNTY METROPOLITAN TRANSPORTATION AUTHORITY — QUARTERLY, ANNUAL, AND SEMI-ANNUAL CUSTOMER SATISFACTION SURVEYS, 2012 – 2015 and 2018.** Included four quarterly surveys per year, each garnering over 3,000 responses. The 2018 surveys resulted in the collection of more than 28,000 responses.

**NASSAU (NY) INTER-COUNTY EXPRESS (NICE) — 2016 AND 2013 TITLE VI SURVEYS.** Project manager for the 2016 and 2013 Nassau (NY) Inter-county Express (NICE) on-board surveys in support of Title VI reporting. Data collection resulted in samples ensuring a statistical accuracy of 95 percent and a ±1 percent margin of error at the system level. Route-specific sample sizes of more than 8,500 surveys ensured statistical accuracy of not less than 95 percent and a ±10 percent margin of error (based on average daily ridership) at the individual level.

**GREATER BUFFALO-NIAGARA REGIONAL TRANSPORTATION COUNCIL – NFTA-METRO CUSTOMER SURVEY.** Project manager for origin/destination study of fixed-route and rail riders within the Niagara Frontier Transportation Authority (NFTA) service area. NFTA-Metro operates 63 bus routes (including 47 local bus routes and 16 Express bus routes)

as well as one light rail line serving Erie and Niagara counties. The survey instrument was made available in four non-English languages present in Erie and Niagara counties (Spanish, Arabic, Burmese, and Karen). A total of 9,697 responses were received, exceeding sample targets and representing a statistical accuracy of 95 percent and a ±1 percent margin of error at the system level, exceeding sample targets.

**LONG BEACH TRANSIT — FY 2018, FY 2017, FY 2016 AND FY 2014 COMMUNITY EVALUATION SURVEYS.** These surveys collected statistically valid data from predetermined bus stops utilizing an intercept methodology on mobile tablets as well as consisted of a phone survey of random households. The bus stop survey collected 50 surveys per stop as designated by the sampling plan, while the telephone survey collected surveys from households in targeted neighborhoods within the Long Beach Transit service area. Following a successful survey effort in spring 2016, Moore & Associates was awarded a five-year contract to provide annual surveys and additional market research services, including quarterly customer service observations.

**CITY OF FORT COLLINS (CO) — ON-BOARD CUSTOMER SURVEYS.** Led surveys of Transfort fixed-route transit service in Colorado. The survey included demographics questions to get a clear view of its customer base in support of Title VI objectives and requirements. A total of 3,519 responses were received on-board and from a supplemental online survey. Supervised a follow-up survey in 2016 aboard Around the Horn and MAX routes. Collection on-board both routes exceeded sample targets. In fall 2017 Moore & Associates completed a third successful data collection effort for the City that resulted in 3,300 responses.

**CITY OF TUCSON — ON-BOARD SURVEY OF TUCSON-AREA FIXED-ROUTE AND DIAL-A-RIDE SERVICES.** Surveyed services including Sun Tran, Sun Van, Sun Shuttle, Sun Express, the Downtown Loop, and Cat Tran. The data collection covered all SunTran services, with approximately 9,500 fixed-route surveys collected against a sample target of 8,980. In addition to

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the on-board survey, Moore & Associates distributed a total of 950 hundred direct-mail surveys to demand-response customers, resulting in the collection of 201 valid responses representing a return rate of more than 21 percent. The resulting data was compiled into a unifying report with tailored analysis and key findings for each service provided.

**ANTELOPE VALLEY TRANSIT AUTHORITY — 2016 ORIGIN AND DESTINATION SURVEY.** Surveys were conducted across 75 percent of all scheduled trips to collect data regarding customer origin and destinations, resulting in nearly 2,300 valid responses.

**GOLDEN EMPIRE TRANSIT DISTRICT — 2015, 2013, AND 2009 CUSTOMER AND COMMUNITY SURVEYS.** Assisted in long-term tracking of public perception via three rider and non-rider survey efforts. 2015 efforts resulted in the collection of more than 3,000 on-board responses, 512 community surveys, and 210 GET-A-Lift surveys. Survey responses revealed improved community perceptions of GET and its services.

**KITSAP (WA) TRANSIT — 2013 ORIGIN-DESTINATION AND MARKET SEGMENTATION SURVEY.** An on-board rider survey was supplemented by a follow-up telephone survey, while a separate telephone-based Market Segmentation Survey compiled data from the community as a whole. A sample of 1,472 valid responses was achieved from the on-board survey. Follow-up telephone surveys were conducted with 250 on-board respondents. The community phone survey resulted in a sample of 512 responses. More than three-fourths of respondents to the community survey indicated a change of mindset regarding the Kitsap Transit service in the prior 12 months.

**CENTRAL CONTRA COSTA TRANSIT AUTHORITY 2015 — FIXED-ROUTE TRANSIT ON-BOARD SURVEY.** Managed successful on-board survey of fixed-route customers, including a smaller survey specific to school tripper routes. The survey codified customer travel behavior, assessed customer satisfaction regarding a variety of County Connection service attributes, provided valuable insight into current as well as future/potential marketing activities, and compiled a variety of rider demographic data to support the agency's federal Title VI reporting. A total sample of 3,178 valid surveys were collected, exceeding the target by more than five percent and ensuring a confidence level of 95 percent and a  $\pm 5$  percent margin of error.

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**KATHY CHAMBERS  
SENIOR ASSOCIATE**



**Project Role**

- Demand analysis
- Service evaluation
- Strategic and financial planning

**Education**

- Bachelor of Music Education, Baylor University, Waco, TX
- Master of Music in Musicology, Texas Christian University, Fort Worth, TX
- Business and Marketing Writing, College of the Canyons, Valencia
- Title VI and Public Transit, NTI

**Professional Involvement**

- California Association for Coordinated Transportation
- Community Transportation Association of America (CTAA)

**OVERVIEW**

Kathy’s strategic analysis capabilities, strong writing abilities, and attention to detail make her an invaluable member of nearly every Moore & Associates’ project team. For the last 13 years, she has crafted strategic market research plans, public engagement campaigns, and recommendations for clients from coast to coast. Her experience relevant to this engagement includes the development of survey instruments, sampling plans, surveyor schedules, focus group facilitation guides, small group discussion guides, workshop presentations, and other outreach materials. Kathy also prepares high-quality analytical reports incorporating multiple data-sets, trend analysis, and insightful findings and recommendations.

**RELEVANT EXPERIENCE**

**CITY OF BURBANK – COMPREHENSIVE OPERATIONAL ANALYSIS AND ON-CALL TRANSIT PROGRAM SUPPORT.** Assisted with service revision to create North Hollywood-Airport route, the first all-day route in the City’s history. Provided public engagement support and demand analysis as part of the City’s Comprehensive Operational Analysis that assessed demand and provided recommendations to optimize resources. Outreach included surveys and stakeholder outreach.

**CITY OF BURBANK – CUSTOMER AND COMMUNITY SURVEYS.** Prepared data analysis and report for the City of Burbank’s Senior and Disabled Transit and fixed-route customer surveys. Crafted onboard, employer, and community survey instruments (in print and online) in support of the City’s 2017 Transit Service Evaluation.

**CITY OF SANTA CLARITA – TRANSPORTATION DEVELOPMENT PLAN.** Wrote service and capital recommendations and financial plan for City of Santa Clarita Transportation Development Plan. Analyzed service evaluation and survey data to develop viable and sustainable recommendations. Researched planned residential and commercial developments within and adjacent to the current service area. Prioritized recommendations based on public and client input, anticipated development dates, and anticipated benefits.

**CITY OF THOUSAND OAKS - TRANSIT MASTER PLAN.** Conducted outreach and supported service planning for the City of Thousand Oaks’ Transit Master Plan. Public engagement for the project included 15 public workshops, customer and community surveys, stakeholder focus groups, a direct mail campaign, and development of a project webpage.

**SANTA YNEZ VALLEY TRANSIT – 2017 SHORT RANGE TRANSIT PLAN.** Conducted community outreach and service planning in support of SRTP. Developed strategies to reduce operating cost and enhance farebox recovery to ensure compliance with TDA. Focus on alternative service delivery for seniors, including potential partnership with local taxi companies or TNCs.

**EAST TEXAS COUNCIL OF GOVERNMENTS – 2016 UPDATE OF THE REGIONALLY COORDINATED TRANSPORTATION PLAN.** Facilitated community survey, stakeholder survey, three stakeholder workshops, and 14 community workshops in support of regional transportation coordination plan update. Prepared recommendations for coordinated transportation strategies across the 14-county area.

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**SOUTHEASTERN ARIZONA GOVERNMENTS ORGANIZATION – COCHISE COUNTY INTERCITY ROUTE FEASIBILITY STUDY.** Study to determine feasibility of intercity bus routes connecting the cities of Benson, Bisbee, Douglas, and Sierra Vista in Cochise County, AZ. Coordinated marketing and public engagement, including stakeholder focus groups, public workshops, and a project webpage that was available in parallel English and Spanish versions.

**CITY OF IRVINE – MARKETING AND COMMUNITY OUTREACH.** Project coordinator for the City of Irvine’s iShuttle marketing program. Coordinated employer and residential outreach to promote the iShuttle and related Metrolink service. Led planning for the Spectrum service launch special events. iShuttle was honored with a Diamond Award for Outstanding Marketing Program in 2012 and received First Place AdWheel awards in 2012 and 2013.

**CITY OF LAGUNA NIGUEL – TRANSIT PLANNING AND FEASIBILITY STUDY.** OCTA study to determine feasibility of local circulator alternatives. Coordinated community surveys and public workshops and prepared presentation materials and workshop handouts. Developed demand assessment and service recommendations, including routes for first City-operated local transit circulator.

**NASSAU INTER-COUNTY EXPRESS – TRANSIT SURVEY SERVICES.** Conducted analysis of customer surveys for the NICE bus system (Nassau County, NY) in support of Title VI objectives. Findings included rider demographics, travel patterns, and customer satisfaction.

**GREATER BUFFALO-NIAGARA REGIONAL TRANSPORTATION COUNCIL – NFTA-METRO CUSTOMER SURVEY.** Provided general project support. Assisted with survey instrument and sampling plan development. Prepared field surveyor schedules in support of sampling goals. Managed data cleaning priorities.

**INTERCITY TRANSIT (WA) – DIAL-A-LIFT CUSTOMER SURVEY.** Project coordinator for telephone and online survey designed to collect feedback from clients who had used the service within the past year as well as those who eligible to use the service but who had not recently done so. Coordinated telephone and online survey, programmed survey instrument, and prepared analysis. The current rider component resulted in the collection of 435 valid surveys, exceeding the sample target of 400. The non-rider survey resulted in 84 valid responses, more than triple those collected in the prior survey effort. Developed and presented report to governing board.

**ANTELOPE VALLEY TRANSIT AUTHORITY – MOBILITY MANAGEMENT PLAN AND ON-CALL SERVICE PLANNING.** The Mobility Management Plan included community outreach and travel training, which in the last five years has resulted in face-to-face interaction with at least 1,500 Antelope Valley residents whose everyday lives would benefit from AVTA’s transit services. Conduct on-site travel training. Provide on-call research and support services related to mobility management as well as transit planning, Title VI Plan update, and alternative transportation (such as vanpools and community partnerships).

**VENTURA COUNTY TRANSPORTATION COMMISSION – HERITAGE VALLEY TRANSIT NEEDS STUDY.** Prepared service recommendations and financial plan for VCTC’s Heritage Valley Transit Study. Researched and recommended organizational structure for potential new operator. Created community-specific circulators reflective of key mobility needs, including home-to-school travel for middle and high school students. Developed fare structure and calculated anticipated fare revenue by incorporating predicted fare elasticity.

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**ERIN KENNEALLY**  
**MARKET RESEARCH MANAGER**



**Project Role**

- Market research
- Data collection
- Community outreach

**Education**

- Bachelor of Arts, Liberal Studies, California State University – Northridge

**Languages**

- Spanish

**Software**

- Statistical Package for the Social Sciences (SPSS)

**OVERVIEW**

Erin has participated in all aspects of Moore & Associates’ market research practice—from survey planning to execution to reporting—for clients across the nation. She has been our on-the-ground manager for on-board surveys of large transit operators on both coasts and dozens of places in between. Additionally, Erin has represented Moore & Associates’ clients at community festivals, fairs, chamber of commerce meetings, parades, public workshops, and other events. Her fluency in Spanish makes her invaluable in ensuring representation from this important market segment.

**RELEVANT EXPERIENCE**

**LOS ANGELES COUNTY METROPOLITAN TRANSPORTATION AUTHORITY – 2015 Fall Satisfaction Survey; 2018 Spring and Fall Satisfaction Surveys; 2019 Spring and Fall Satisfaction Surveys.** Provided in-field supervision for FY 2015 onboard rider survey, which resulted in a sample size of more than 19,000, exceeding sample targets. Project coordinator for Spring and Fall FY 2018 onboard rider surveys. Created stratified sampling plan and surveyor schedules, trained surveyors and supervised all data collection efforts. Oversaw all data cleaning, conducted data analysis and reporting. Recently completed the first round of Metro’s 2019 survey (Spring) resulting in nearly 15,000 surveys.

**VENTURA COUNTY TRANSPORTATION COMMISSION – 2019 Origin/Destination, Transfer, and Customer Satisfaction Surveys.** Acted as project coordinator and main point of contact for VCTC’s 2019 data collection efforts. Created surveyor schedules,

trained surveyors and supervised all data collection efforts for three different survey efforts occurring simultaneously across Ventura County. Oversaw all data cleaning, conducted data analysis and reporting. The origin/destination survey covered a total of 18 routes on six different operators throughout Ventura County: VCTC, Gold Coast Transit District (GCTD), Thousand Oaks Transit (TOT), Simi Valley Transit (SVT), Moorpark City Transit (MCT), and the Valley Express. The transfer surveys included 12 different transfer locations. The customer satisfaction surveys were conducted on the VCTC Intercity and Valley Express services.

**CITY OF SANTA CLARITA – 2018 Transportation Development Plan (TDP).** Acted as coordinator for multiple survey efforts in support of Santa Clarita’s 2018 update to its Transportation Development Plan. The 2018 update included a local fixed-route rider survey, paratransit rider survey, community survey, and special survey of school tripper riders. Ride checks on all Santa Clarita Transit routes were also included in order to provide on-time performance and boarding and alighting data that could assist in route and service planning. Assisted with community outreach efforts on behalf of the City, attending multiple rounds of community workshops to provide Spanish interpretation.

**GREATER BUFFALO-NIAGARA REGIONAL TRANSPORTATION COUNCIL – 2017 Transit Survey.** Created stratified sampling plan, contacted temp firms, created training materials, trained temps, supervised data collection efforts of team of over 30 temps. Created surveyor schedules. Oversaw data cleaning, assisted with data analysis and geocoding, assisted with report. Created quarterly progress memos. Data collection resulted in nearly 9,700 valid surveys exceeding target samples.

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**NASSAU (NY) INTER-COUNTY EXPRESS (NICE) — 2016 Title VI Survey.** Supervised data collection for 2016 Nassau Inter-County Express (NICE) on-board survey in support of Title VI reporting. Prepared control sheets, temp staff schedules, and training materials. Conducted temp training. Assisted with data cleaning and analysis. Data collection resulted in more than 8,600 valid surveys.

**MONTEREY-SALINAS TRANSIT — 2016 and 2018 Rider and Community Surveys.** Administered rider and community intercept surveys on behalf of Monterey-Salinas Transit in English and Spanish to current rider and non-rider populations. Supervised and managed survey staff on-site at multiple transit hub locations. Completed surveying ahead of schedule and exceeded sampling targets during both rounds of data collection.

**LONG BEACH TRANSIT — FY 2018, 2017, 2016, and 2014 Customer and Community Evaluation Surveys.** Project coordinator for annual current rider and non-rider surveys on behalf of Long Beach Transit. Managed bilingual (English/Spanish) fielding team for both onboard and community surveys. Oversaw data verification, entry, and cleaning of collected data. Conducted data analysis, created a comprehensive report and PowerPoint and presented all findings to the Board.

**ANTELOPE VALLEY TRANSIT AUTHORITY — Mobility Management.** Led travel training sessions, conducting presentations (in both English and Spanish) to groups representing transit-dependent populations, including seniors, students, and people with disabilities. AVTA's Travel Training program resulted in face-to-face interaction with at least 1,500 Antelope Valley residents helping to mitigate barriers to transit usage among historically transportation-disadvantaged individuals.

**ANTELOPE VALLEY TRANSIT AUTHORITY — "Mystery Rider" Ridecheck.** Oversaw mystery-rider driver observation and ride check project for the Antelope Valley Transit Authority's (AVTA) fixed-route services. Developed surveyor schedules and supervised the collection of data, including field inspections of ride checkers ensuring accuracy and validity of response data. Reviewed submitted data for accuracy and prepared quarterly reports. Evaluations included on-time performance assessment, and objective evaluation of driver performance resulting in improved customer service and performance. Also conducted ridechecks for APC validation of AVTA's fleet in 2017.

**FOOTHILL TRANSIT — Coach Operator Audits.** Has acted as project coordinator for Foothill Transit's quarterly Coach Operator Performance Audits and Transit Store Customer Service Audits since 2016. Acts as field supervisor, develops surveyor schedules, trains and manages surveyor staff to ensure best research practices are upheld. Data collection is conducted across all system routes (over 35 individual routes). Evaluation includes on-time performance assessment, and objective evaluation of driver performance resulting in improved customer service and performance. Reviews submitted data for accuracy and supervises all data entry and cleaning. Conducts data analysis and prepares quarterly reports with detailed summaries of fielding and data collection efforts including a comprehensive matrix detailing any safety or customer service violations observed. Additionally, Conducts in-person and telephone customer service audits; requesting information and assistance in both English and Spanish. Thoroughly documents level of response, noting any concerns, and identifying instances of exceptional customer service

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**ALLISON MOORE**  
**MARKETING PRACTICE LEADER**



**Project Role**

- Creative direction
- Promotion
- Outreach support

**Education**

- Bachelor of Arts in History, University of California, Berkeley
- SCAQMD Rule 2202 ETC Certification
- Access Services Public and Media Relations Workshop

**Professional Involvement**

- California Association for Coordinated Transportation (CalACT)
- American Public Transportation Association (APTA) Marketing Conference
- American Marketing Association (AMA)

**OVERVIEW**

Allison brings more than a decade of public transit industry experience to the marketing team, including project management experience for clients throughout California and the western United States.

**RELEVANT EXPERIENCE**

**GOLDEN EMPIRE TRANSIT DISTRICT – MARKETING AND ADVERTISING SERVICES.** Project manager for marketing services for Golden Empire Transit District since 2017. Oversees annual marketing campaign development and general marketing support. Conducts multiple annual campaigns, including a testimonial campaign in the fall and a Summer Youth Pass (SYP) campaign in the spring/summer. Have also designed vehicle wraps and promoted GET’s new microtransit service, RYDE, with great success. In 2017, the SYP campaign received an award of merit from the Kern Council of Governments.

**CITY OF MODESTO – TRANSIT MARKETING SERVICES.** Project manager for marketing services for Modesto Area Express (MAX) since 2017. Oversees annual marketing plan development, campaign development, and general marketing support. Launched and maintains social media accounts. Developed brand style guide and cohesive look to all marketing materials. MAX saw its highest ridership growth in July 2019 with 62% increase over July 2018.

**NORTHERN ARIZONA INTERGOVERNMENTAL PUBLIC TRANSPORTATION AUTHORITY (NAIPTA) – CREATIVE SERVICES MARKETING.** Project coordinator for marketing and wayfinding projects since 2012. Oversees campaign development as well as general marketing support. Prepared marketing plan and multiple marketing campaigns. In 2016, led promotional effort regarding Proposition 411 Transit Tax measure to provide service funding through 2030; this measure passed with 71 percent of the vote. Work has garnered numerous APTA AdWheel awards, including two in 2016 and another in 2019.

**CITY OF BURBANK – MARKETING SUPPORT.** For more than 10 years, has served as project coordinator for BurbankBus, a multi-year marketing contract. Coordinates employer and residential outreach in focus neighborhoods and key employment centers. Responsible for strategic planning, conceptual design, and special events. Oversees customer relations procedures and quality control.

**CITY OF SANTA MARIA -- TRANSIT MARKETING SERVICES.** Project manager for marketing services for Santa Maria Area Transit (SMAT) since 2018. Oversees annual marketing plan development, campaign development, and general marketing support. Responsible for designing and maintaining multiple service information websites.

**SANTA YNEZ VALLEY TRANSIT – MARKETING.** Project coordinator, overseeing outreach to stakeholders and target markets in the Santa Ynez Valley. Activities include coordination and facilitation of special events, and design and production of informational and promotional materials.

**VALLEY EXPRESS – PROGRAM LAUNCH AND TRANSIT MARKETING SERVICES.** Project coordinator since service launch of Valley Express, a VCTC service in Ventura County’s Heritage Valley which began in spring 2015, including naming contest, development of logo and branding, service brochures, and website. Post-launch marketing activities include development of website and social media platforms, promotion of holiday services, utility bill inserts, development of new fare media options, brochure distribution, and info-post updates.

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**CITY OF IRVINE — TRANSIT MARKETING, COMMUNICATIONS, AND COMMUNITY OUTREACH.** As project coordinator for more than five years, oversaw employer and residential outreach within the Irvine Business Complex and Irvine Spectrum on behalf of the City to promote the iShuttle and related Metrolink service. Oversaw development of all marketing collateral. Pioneered bi-annual campaigns, earning multiple APTA AdWheel awards.

**VENTURA COUNTY TRANSPORTATION COMMISSION — MARKETING AND OUTREACH SERVICES.** Project coordinator for more than five years, including scheduling and completion of marketing and outreach tasks. Responsible for strategic planning, conceptual design, special events, and youth outreach (Teen Council). In 2014, supported VCTC in its desire to rebrand its VISTA service as VCTC Intercity Transit, developing new bus branding, coordinating installation of bus decals, and updating associated collateral, as well as planning and facilitating a launch event. Earned multiple APTA AdWheel awards.

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## Appendix B

### Required Forms

- Campaign Contribution Disclosure Forms
- Status of Past and Present Contracts Form
- Proposal Exceptions and/or Deviations Form



ORANGE COUNTY TRANSPORTATION AUTHORITY  
CAMPAIGN CONTRIBUTION DISCLOSURE FORM

RFP Number: 9-1505 RFP Title: TRANSP NEEDS ASSESSMENT

Was a campaign contribution made to any OCTA Board Member within the preceding 12 months, regardless of dollar amount of the contribution by either the proposing firm, proposed subconsultants and/or agent/lobbyist? Yes  No

If no, please sign and date below.

If yes, please provide the following information:

Prime Contractor Firm Name: \_\_\_\_\_

Contributor or Contributor Firm's Name: \_\_\_\_\_

Contributor or Contributor Firm's Address: \_\_\_\_\_

Is Contributor:

- The Prime Contractor Yes  No
- Subconsultant Yes  No
- Agent/Lobbyist hired by Prime to represent the Prime in this RFP Yes  No

Note: Under the State of California Government Code section 84308 and California Code of Regulations, Title 2, Section 18438, campaign contributions made by the Prime Contractor and the Prime Contractor's agent/lobbyist who is representing the Prime Contractor in this RFP must be aggregated together to determine the total campaign contribution made by the Prime Contractor.

Identify the Board Member(s) to whom you, your subconsultants, and/or agent/lobbyist made campaign contributions, the name of the contributor, the dates of contribution(s) in the preceding 12 months and dollar amount of the contribution. Each date must include the exact month, day, and year of the contribution.

Name of Board Member: \_\_\_\_\_

Name of Contributor: \_\_\_\_\_

Date(s) of Contribution(s): \_\_\_\_\_

Amount(s): \_\_\_\_\_

Name of Board Member: \_\_\_\_\_

Name of Contributor: \_\_\_\_\_

Date(s) of Contribution(s): \_\_\_\_\_

Amount(s): \_\_\_\_\_

Date: AUGUST 15, 2019

MOORE ASSOCIATES, INC  
Print Firm Name

  
Signature of Contributor

JAMES G. MOORE  
Print Name of Contributor

ORANGE COUNTY TRANSPORTATION AUTHORITY  
CAMPAIGN CONTRIBUTION DISCLOSURE FORM

RFP Number: 9-1505 RFP Title: Transportation Needs Assessment

Was a campaign contribution made to any OCTA Board Member within the preceding 12 months, regardless of dollar amount of the contribution by either the proposing firm, proposed subconsultants and/or agent/lobbyist? Yes  No

If no, please sign and date below.

If yes, please provide the following information:

Prime Contractor Firm Name: \_\_\_\_\_

Contributor or Contributor Firm's Name: \_\_\_\_\_

Contributor or Contributor Firm's Address: \_\_\_\_\_

Is Contributor:

- The Prime Contractor Yes  No
- Subconsultant Yes  No
- Agent/Lobbyist hired by Prime to represent the Prime in this RFP Yes  No

Note: Under the State of California Government Code section 84308 and California Code of Regulations, Title 2, Section 18438, campaign contributions made by the Prime Contractor and the Prime Contractor's agent/lobbyist who is representing the Prime Contractor in this RFP must be aggregated together to determine the total campaign contribution made by the Prime Contractor.

Identify the Board Member(s) to whom you, your subconsultants, and/or agent/lobbyist made campaign contributions, the name of the contributor, the dates of contribution(s) in the preceding 12 months and dollar amount of the contribution. Each date must include the exact month, day, and year of the contribution.

Name of Board Member: \_\_\_\_\_

Name of Contributor: \_\_\_\_\_

Date(s) of Contribution(s): \_\_\_\_\_

Amount(s): \_\_\_\_\_

Name of Board Member: \_\_\_\_\_

Name of Contributor: \_\_\_\_\_

Date(s) of Contribution(s): \_\_\_\_\_

Amount(s): \_\_\_\_\_

Date: 8-16-19



Signature of Contributor

ANIK International  
Print Firm Name

Nisha Shah  
Print Name of Contributor



**STATUS OF PAST AND PRESENT CONTRACTS FORM**

On the form provided below, Offeror/Bidder shall list the status of past and present contracts where the firm has either provided services as a prime vendor or a subcontractor during the past five (5) years in which the contract has been the subject of or may be involved in litigation with the contracting authority. This includes, but is not limited to, claims, settlement agreements, arbitrations, administrative proceedings, and investigations arising out of the contract.

A separate form must be completed for each contract. Offeror/Bidder shall provide an accurate contact name and telephone number for each contract and indicate the term of the contract and the original contract value. Offeror/Bidder shall also provide a brief summary and the current status of the litigation, claims, settlement agreements, arbitrations, administrative proceedings, or investigations. If the contract was terminated, list the reason for termination.

Offeror/Bidder shall have an ongoing obligation to update the Authority with any changes to the identified contracts and any new litigation, claims, settlement agreements, arbitrations, administrative proceedings, or investigations that arise subsequent to the submission of the bid. Each form must be signed by an officer of the Offeror/Bidder confirming that the information provided is true and accurate.

Project city/agency/other: <b>NONE TO REPORT</b>	
Contact Name:	Phone:
Project Award Date:	Original Contract Value:
Term of Contract:	
(1) Litigation, claims, settlements, arbitrations, or investigations associated with contract:	
(2) Summary and Status of contract:	
(3) Summary and Status of action identified in (1):	
(4) Reason for termination, if applicable:	

By signing this Form entitled "Status of Past and Present Contracts," I am affirming that all of the information provided is true and accurate.

**JAMES G. MOONE**  
 Name  
**MANAGING PARTNER**  
 Title

  
 Signature  
**AUGUST 15, 2019**  
 Date

**PROPOSAL EXCEPTIONS AND/OR DEVIATIONS**

The following form shall be completed for each technical and/or contractual exception or deviation that is submitted by Offeror for review and consideration by Authority. The exception and/or deviation must be clearly stated along with the rationale for requesting the exception and/or deviation. If no technical or contractual exceptions or deviations are submitted as part of the original proposal, Offerors are deemed to have accepted Authority's technical requirements and contractual terms and conditions set forth in the Scope of Work (Exhibit A) and Proposed Agreement (Exhibit C). Offerors will not be allowed to submit this form or any contractual exceptions and/or deviation after the proposal submittal date identified in the RFP. Exceptions and/or deviations submitted after the proposal submittal date will not be reviewed by Authority.

Offeror: MOORE 3 ASSOCIATES

RFP No.: \_\_\_\_\_ RFP Title: \_\_\_\_\_

Deviation or Exception No. : NONE

Check one:

- Scope of Work (Technical) \_\_\_\_\_
- Proposed Agreement (Contractual) \_\_\_\_\_

Reference Section/Exhibit: \_\_\_\_\_ Page/Article No. \_\_\_\_\_

Complete Description of Deviation or Exception:

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Rationale for Requesting Deviation or Exception:

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Area Below Reserved for Authority Use Only:
