



NOTICE TO OFFERORS

April 23, 2024

AFFILIATED AGENCIES

*Orange County
Transit District*

*Local Transportation
Authority*

*Service Authority for
Freeway Emergencies*

*Consolidated Transportation
Service Agency*

*Congestion Management
Agency*

*Service Authority for
Abandoned Vehicles*

SUBJECT: Request for Proposal (RFP) 4-2193 "Rider Safety Perception Survey Services"

All Offerors:

This letter shall serve as **Addendum No. 1** to the above RFP issued by the Orange County Transportation Authority (OCTA). Offerors are reminded that the proposal submittal due date is at or before **2:00 p.m., May 1, 2024.**

The following are responses to written questions received on or before 2:00 p.m. on April 17, 2024, as stated in the RFP package.

Question 1: There appear to be both qualitative and quantitative research elements desired in this RFP. However, the RFP speaks to the survey (which is typically a quantitative instrument) as "qualitative". Can you please elaborate on what you are hoping to achieve?

Response 1: The survey and research include both qualitative and quantitative elements.

The survey itself, as developed by the Mineta Institute (links within Exhibit A, Scope of Work, of the RFP) is mostly multiple selection options, with limited write-in responses. Most questions in the survey ask for close-ended responses and are meant to assess bus riders' current perceptions of safety and note factors that affect these perceptions.

OCTA may be adding additional questions to this developed survey, such as gathering suggested improvements, which may be more qualitative.

The focus group sessions will likely be more qualitative and will supplement survey data by allowing more in-depth discussion, follow-up questions, and perspectives of transit rider safety, hence the qualitative aspect of the survey.

Question 2: What is the annual ridership on OCTA's buses and Metrolink?

Response 2: **This survey will be for OC Bus riders only, so only this information is included.**

Total annual ridership for OC Bus (as of Calendar Year 2023) is 32 million boardings. See Attachment A to this Addendum No. 1, for additional details of ridership (boardings) by individual routes.

Question 3: The RFP states the project is for qualitative surveys yet with a need for statistical reliability. Is the OCTA envisioning this study as mostly open-ended in-depth interview type questions or more of a quantitative approach with close ended responses – or perhaps a hybrid of both? We understand there will be more traditional qualitative aspects such as stakeholder meetings and focus groups but just seeking some clarity on the “qualitative survey.”

Response 3: **Please also see response to Question 1, which discusses the quantitative and qualitative elements of this research effort.**

The qualitative focus groups will provide the opportunity to speak directly to selected representatives or groups for insights and to elaborate upon responses and themes noted in the print survey.

In terms of statistical reliability, OCTA does not expect the survey effort to meet the requirements for strict statistical significance – as riders willing to participate in the survey will be self-selected, among other reasons.

However, OCTA wishes to ensure that the results of the survey gather information across the OC Bus service area and routes, ensuring sampling to obtain meaningful results and ensuring that feedback is obtained from many types of riders and service areas. Attachment A to this Addendum No. 1 provides additional details about ridership (boardings) on each route, along with the endpoints of each route.

OCTA looks to the consultant to provide recommendations for the needed sample size and

sampling plan for surveys collected for this effort. For reference, a currently in-process onboard “Origin & Destination” rider survey has determined their target sample size to be approximately 14,000 responses.

Question 4: Does the OCTA have a database of riders that it keeps? And if so, could it be used to help recruit for focus groups?

Response 4: OCTA does not have a database of riders. However, OCTA does have an e-mail interest list and other marketing tactics (discussed in other responses) that could be used to assist in recruiting focus groups participants.

Note that the contractor will be ultimately responsible for conducting outreach and finding qualified candidates for the focus groups.

Question 5: For the on-board surveys, is the OCTA ok with giving incentives? In projects with other transit authorities, we have distributed bus passes or offered a sweepstakes if they fill out the survey. Is this something that the OCTA would entertain and if it were bus passes, is that something the OCTA would provide?

Response 5: Yes, incentives are allowed to encourage participation rates for both the survey and the focus groups.

OCTA has previously provided a chance to win a quantity of 30-Day bus passes (sweepstakes) and is willing to provide passes if requested.

If additional incentives are needed (as they may be to ensure high levels of participation), OCTA would be interested in hearing recommendations from the contractor. The contractor would be responsible for purchasing, managing, and distributing any incentives such as gift cards and / or other focus group participation incentives.

Question 6: How does OCTA currently determine if people are safe?

Response 6: This will be OCTA’s first time conducting a survey focusing specifically on perceptions of transit safety.

As the survey is focused on a rider's perception of safety (i.e., how safe and secure do they feel on OC Bus), it may not necessarily be directly related to OCTA's other safety measures.

Other recent surveys that have included safety as a topic asked a Likert scale question for the prompt "I feel safe and secure waiting for my bus" and "I feel safe riding on the bus."

Question 7: How does OCTA currently communicate with its riders?

Response 7: OCTA communicates with its customers through multiple channels, including but not limited to: e-mail, social media (Facebook/Instagram/X), SMS alerts, the OCTA.net website, email newsletters, blog posts, mobile in-app notifications, onboard bus signage, and printed rider alerts onboard the buses.

Question 8: Is there an app?

Response 8: OCTA has a mobile app for OC Bus riders which can be used to distribute in-app notifications (such as links to a web version of the survey). Note that not all riders use the mobile app.

Question 9: Printed ballots at specific stations for people to fill out?

Response 9: Yes, printed surveys could be distributed at transit centers or major transfer points.

OCTA is interested in collecting feedback on rider's perceptions both onboard OC Bus and while waiting for OC Bus (at bus stops).

Note that merely distributing surveys at stops may make it difficult to collect completed surveys and/or establish what routes were associated with a survey response. Additionally, distributing surveys at specific stops may not provide adequate sample distribution.

Question 10: QR code to fill out the survey on their phone?

Response 10: The survey is planned as a print, on-board rider survey, so QR codes are not needed. If a digital version of the

survey is determined to be needed, OCTA can generate QR codes.

Question 11: Are we creating a new survey that Minutia already created, modifying it, or creating a new one based on the parameters from the FRP?

Response 11: The Mineta Institute survey will be used as a starting point for survey instrument development. OCTA staff and the contractor may add additional questions to be incorporated as necessary.

Question 12: How many different languages are represented within the survey?

Response 12: This survey will be distributed in English and seven (7) other languages (eight [8] languages total). The seven (7) other languages for translation are mentioned in Exhibit A, Scope of Work, of the RFP: Spanish, Vietnamese, Chinese, Korean, Tagalog, Farsi, and Arabic.

Note that the Mineta Institute survey has already been translated into most required languages (except Arabic and Farsi).

The consultant would be responsible for any additional translation needed (such as additional questions to be added).

Question 13: Do the surveys need to be in every language?

Response 13: The surveys need to be available in the requested languages.

Each printed survey does not need to include all language options. Previous surveys have developed translated print survey options that can be distributed if needed.

Question 14: How are we going to be able to get in contact with people who have previously ridden the bus in the past 6 months?

Response 14: The survey will be focused on active OC Bus riders, many of whom ride on a daily or weekly basis.

Participants can self-report how often they use OC Bus in the survey.

There is no requirement to attempt to survey riders who have stopped riding OC Bus, and OCTA would not have any information about how to reach this specific audience.

Question 15: What constitutes a complete survey? Is a partial survey counted?

Response 15: A completed survey has all relevant responses completed. Partial or significantly incomplete surveys may not be considered for sampling purposes (as they would be missing questions or details needed).

However, the contractor is expected to collect and process all surveys received to obtain as much data as possible.

Question 16: What is the average length of a bus trip?

Response 16: The average length of a bus trip can vary based on the trip purpose, route, and time of day.

As an approximate travel time, for the month of March 2024, the average weekday travel time per trip was estimated to be twenty-eight (28) minutes. This time may not include transfer time between different routes.

Question 17: How long does it take to complete the survey?

Response 17: The survey takes about five (5) minutes or less to complete.

Question 18: How do we handle the hearing impaired to complete the survey?

Response 18: OCTA welcomes contractor responses to make the survey and focus groups accessible.

For hearing impaired individuals, the existing print survey is a likely option.

Question 19: Will OCTA share an email list/contact info for past and current bus riders to the winning offeror?

Response 19: Please see response to Question 4.

Question 20: Does OCTA provide the workers conducting the surveys free rides or vouchers saying they are part of the OCTA Safety program?

Response 20: OCTA will notify bus drivers about the survey effort in advance, including noting any uniform (vests) that survey takers will be wearing.

OCTA will provide verification letters to contractor for survey takers. The letters will notify drivers that survey takers are not required to pay bus fare when boarding the bus for survey collection purposes.

Question 21: Can OCTA provide any existing and or previous surveys that were conducted in the past.

Response 21: Please see the Mineta Institute survey (link can be found in Exhibit A, Scope of Work, of the RFP) for existing survey examples.

Additional OCTA surveys for a variety of subjects can be found at the following link:

<https://www.octa.net/news/publications/market-research/>

Question 22: Will there be any type of incentive that OCTA will provide or contribute for these riders to participate in?

Response 22: Please see response to Question 5.

Question 23: For data collection portion, it doesn't sound like OCTA has any sort of survey platform we are to work off of. It primarily sounds like once we collect, analyze, and compile the data ourselves we are to collaborate with OCTA staff and then finalize the data by providing them the data in a suitable format. I just wanted to confirm this.

Response 23: OCTA does not have an expected survey platform for this effort. OCTA has access to SurveyMonkey, which could be used if a digital version of the survey(s) are needed.

As the primary effort of the survey is planned as a print, onboard bus rider survey, no online survey platform may be needed.

Should online or other methods be used to gather survey responses (in addition to onboard survey collection), care should be taken to ensure that the respondents are actual riders, identify the specific routes taken (or other data needed for sampling), and ensure high quality responses.

As noted in the question, in addition to collecting, data entry, analyzing, and providing the survey data, the contractor is expected to provide the needed summary data (Phase 5 in Exhibit A, Scope of Work, of the RFP), as well as develop a final report, an executive summary, and a presentation after survey completion (Phase 6 in Exhibit A, Scope of Work, of the RFP).

Offerors are reminded to acknowledge receipt of this Addendum No. 1 in their transmittal letter and Exhibit B, "Price Summary Sheet." All changes addressed in this Addendum No. 1 shall be incorporated into the final Agreement.

Questions regarding this Addendum No. 1 should be directed to the undersigned at gtorres@octa.net.

Sincerely,

A handwritten signature in cursive script that reads "Gina Torres".

Gina Torres
Senior Contract Administrator
Contracts Administration and Materials Management

Route Number	Route Desc.	Average Weekday Boardings	Average Saturday Boardings	Average Sunday Boardings	Average Monthly Boardings
1	Long Beach - San Clemente	1,267	1,024	903	35,679
25	Fullerton - Huntington Beach	1,082	780	633	29,298
26	Buena Park - Yorba Linda	1,503	728	597	37,845
29	La Habra - Huntington Beach	4,356	4,493	3,775	130,030
30	Cerritos - Anaheim	1,384	775	692	35,970
33	Fullerton - Huntington Beach	1,040	408	335	25,388
35	Fullerton - Huntington Beach	1,846	1,210	959	48,947
37	La Habra - Fountain Valley	2,684	1,377	1,103	68,084
38	Lakewood - Anaheim Hills	3,044	1,269	1,062	75,114
42	Orange - Seal Beach	3,701	2,693	2,474	101,756
43	Fullerton - Costa Mesa	5,611	5,591	4,940	166,725
46	Long Beach - Orange	1,609	876	826	41,839
47	Fullerton - Newport Beach	5,945	3,940	3,822	161,153
50	Long Beach - Orange	3,520	2,353	1,977	94,284
53	Orange - Irvine	3,399	3,343	2,630	99,056
54	Garden Grove - Orange	2,927	1,804	1,464	76,807
55	Santa Ana - Newport Beach	3,467	2,442	2,195	94,430
56	Garden Grove - Orange	1,397	771	619	35,923
57	Brea - Newport Beach	7,988	5,575	4,720	215,905
59	Anaheim - Irvine	1,619	534	405	38,553
60	Long Beach - Tustin	5,159	4,391	3,772	146,489
64	Huntington Beach - Tustin	5,694	4,139	3,579	155,772
66	Huntington Beach - Irvine	5,642	4,130	3,872	155,780
70	Sunset Beach - Tustin	2,545	1,465	1,152	65,761
71	Yorba Linda - Newport Beach	1,530	1,067	862	41,150
72	Sunset Beach - Tustin	1,545	720	550	38,509
76	Huntington Beach - Newport Beach	358			7,572
79	Tustin - Newport Beach	1,296	705	578	33,240
82	Mission Viejo - Rancho Santa Margarita	249			5,261
83	Anaheim - Laguna Hills	1,555	1,115	881	42,017
85	Mission Viejo - Dana Point	283			5,989
86	Costa Mesa - Mission Viejo	504			10,674
87	Rancho Santa Margarita - Laguna Niguel	274		-	5,798
89	Lake Forest - Laguna Beach	861	581	508	23,207
90	Tustin - Dana Point	997	449	374	24,837
91	Mission Viejo - Laguna Hills	1,224	804	577	32,201
123	Anaheim to Huntington Beach	869			18,391
129	La Habra - Anaheim	580	390	323	15,530
143	La Habra - Brea	690	372	259	17,460
150	Santa Ana to Costa Mesa	895			18,935
153	Brea - Orange	329	226	172	6,075
167	Anaheim - Irvine	760	3		16,095
177	Foothill Ranch - Laguna Hills	307	140		7,097
178	Huntington Beach - Irvine	363			7,683
400	iShuttle Route A to John Wayne Airport	89			1,846
401	iShuttle Route B to Irvine Business Complex	130			2,712
402	iShuttle Route C to Spectrum Area	62			1,224
403	iShuttle Route D to Spectrum Area	123			2,563
453	Orange Metrolink Station - Orange	69			1,461
463	Santa Ana Depot to Imperial Promenade	51			733
472	Tustin Metrolink Station to Irvine	88			1,860
473	Tustin Metrolink Station to UCI	165			3,493
480	Irvine Metrolink Station - Irvine Spectrum	55			1,165
529	GWTC to FPNR - Bravo!	984	-		20,833
543	Fullerton - Costa Mesa - Bravo!	2,233	1,369	1,456	48,765
553	Orange - Santa Ana	1,592			32,558
553	Orange - Santa Ana - Bravo!	1,383			20,055
560	Santa Ana to Long Beach - Bravo!	1,603			33,928
862	Downtown Santa Ana Shuttle	234	88	76	5,697
7500	Contract Special Trips - Mid Service	48	14	9	911
7700	OCTA Special Trips - Mid Service	10	3	6	16
Total Average Ridership		102,817	64,153	55,135	2,694,125