

BEFORE THE CONTRACT REVIEW BOARD

FOR THE PURPOSE OF AMENDING THE	)	RESOLUTION NO. 96-2272
CONTRACT BETWEEN METRO AND BARNEY	)	
& WORTH (CONTRACT NO. 904404) FOR	)	Introduced by
CONSULTANT SERVICES ASSOCIATED	)	
WITH THE COMPLETION OF THE PORT-	)	Mike Burton
LAND METROPOLITAN AREA ARTERIAL	)	Executive Officer
FUND PROGRAM	)	

WHEREAS, Metro executed Contract No. 904404 with Barney & Worth, Inc. in 1995; and

WHEREAS, Additional consultant services are necessary to complete scope of work tasks; and

WHEREAS, Additional surveys and focus group tasks have been requested to help further define a ballot measure; and

WHEREAS, This request represents a shift in existing or available resources and is not a request for new funds; and

WHEREAS, The Regional Transportation Planning Section of the Transportation Department has established that Barney & Worth, Inc. has performed the work as specified and satisfactorily within the terms of the contract; and

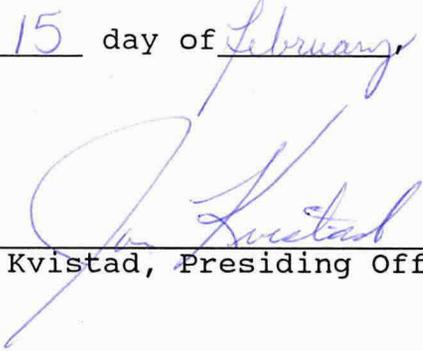
WHEREAS, The Metro Council as Public Contract Review Board may declare that it is in the public's interest for this work on the Regional Arterial Fund Program to move forward in the most expedient manner, accepts those findings and waives competitive bidding; now, therefore,

BE IT RESOLVED,

That the Metro Contract Review Board authorizes the execution of Change Order No. 1 to Contract No. 904404 with Barney & Worth,

Inc. pursuant to the terms of Metro Code Sections 2.04.054(a)(2) and (3) by increasing the contract value by \$27,900.

ADOPTED by the Metro Council this 15 day of February, 1996.

  
\_\_\_\_\_  
Jon Kvistad, Presiding Officer

Approved as to Form:

  
\_\_\_\_\_  
Daniel B. Cooper, General Counsel

WDB:lmk  
96-2272.RES  
1-24-96

# CHANGE ORDER SUMMARY

CHANGE ORDER NO: 1 INITIATION DATE: 1/24/95  
CONTRACT NO: 904404 PROJECT: Arterial Fund Program  
CONTRACTOR: Burney & Worth Inc VENDOR # \_\_\_\_\_  
PROPOSED BY: A. Cotugno / Transportation  
PROJECT MANAGER/DEPARTMENT

## FINANCIAL IMPACT

BUDGET CODE/TITLE: 140 122100 524190 44210

Original Contract Sum: \$ 224,800

Net Change Orders to Date: \$ —

Contract Sum Prior to this C/O: \$ 224,800

This Change Order Request: \$ 27,900

New Contract Sum, Post C/O: \$ 252,700

Fiscal Year 95 - 96  
Appropriation \$ 224,800

Contract, Paid to Date: \$ 188,262

Est. Appropriation Remaining: \$ 36,537

EFFECTIVE DATE(S): 7/19/95 - 6/30/96

## REVIEW & APPROVAL:

\_\_\_\_\_  
DIVISION MANAGER DATE  
A. Cotugno 1-24-96  
\_\_\_\_\_  
DEPARTMENT DIRECTOR DATE  
\_\_\_\_\_  
DIRECTOR GENERAL SERVICES DATE

\_\_\_\_\_  
FISCAL DATE  
\_\_\_\_\_  
BUDGET (MULTI-YEAR ONLY) DATE  
\_\_\_\_\_  
LEGAL DATE

AMENDMENT NO. 1  
CONTRACT NO. 904404

This Agreement hereby amends the above titled contract between Metro, a metropolitan service district, and Barney & Worth, Inc., hereinafter referred to as "Contractor."

This amendment is a change order to the original Scope of Work as follows: Item 1. Payment: This contract amount of \$224,800 shall be increased by \$27,900, bringing the adjusted total to \$252,700. Item 2. Scope of Work: New work tasks shall be included in accordance with Attachment A.

Except for the above, all other conditions and covenants remain in full force and effect.

In Witness to the above, the following duly authorized representatives of the parties referenced have executed this agreement:

CONTRACTOR: Barney & Worth, Inc. METRO

\_\_\_\_\_  
SIGNATURE DATE

\_\_\_\_\_  
SIGNATURE DATE

\_\_\_\_\_  
NAME

\_\_\_\_\_  
NAME

\_\_\_\_\_  
TITLE

\_\_\_\_\_  
TITLE

**METRO REGIONAL ARTERIAL PROGRAM  
REVISED SCOPE OF WORK (1/24/96)**

**Task B Public Attitude Surveys**

**Purpose:** To compile and analyze information on public values and attitudes in the Metro region which can provide guidance in shaping the Regional Arterial Program.

**Tasks:** A successful Regional Arterial Program will require input and support from the public. Understanding public values and attitudes toward such a program is a critical initial step. To establish an in-depth understanding of key public attitudes toward funding a Regional Arterial Program, a five-step public opinion research program will be conducted:

1. Review of Other Recent Public Opinion Research. Considerable market research has been done in the last three to five years on public service delivery and funding. Tri-Met has researched transit funding options, the City of Portland has done research on "service values," and various local agencies polled voters on perceptions and support for their own public services. Reviewing this existing data at the start of the task will not only assist in providing a contextual framework for developing a survey targeted to the Regional Arterial Program, but will also provide a larger base of data for planning. Using Existing data, where still appropriate and current also maximizes use of the project's limited time and budget.
2. Telephone Survey of 600 Registered Voters in the Metro District. Respondents will be randomly contracted; however, only those most likely to vote will be interviewed, and some targeting of geographic and demographic characteristics will be employed to ensure a representative sample of the voting population is surveyed. The purpose is to establish a baseline of public understanding of a Regional Arterial Program, including an initial measure of funding support. Types of questions might include: Understanding of regional arterial planning components; perceptions of program value; interest in public funding of such a program; key information needed by voters. Actual survey questions will be developed in conjunction with the Regional Arterial Fund Group.

Following a pre-test with 25 voters, the survey instrument will be modified as necessary. The 600 sample survey will be administered from a central telephone facility, on evenings and weekends to reach working voters. The survey will be completed in two weeks to ensure a consistent response timeframe. Survey results are data entered separate from interviewing to allow 100% verification, a strength over on-line interviewing. Results will be reported in both an easy-to-read data run format, including up to 20 data cross-tabulations; and a written report with research conclusions and recommendations. An executive summary will be prepared for oral presentation.
3. Two Focus Groups. qualitative, inter-active discussions will be held with likely-to-vote registered voters. The focus groups, targeted at 10-12 voters each, will explore in greater depth any obstacles to funding support identified by the baseline telephone survey, and will also review potential capital improvements and test public information materials for use in public outreach. The advantage of the focus group sessions would be to provide an opportunity to explore in-depth attitudes behind citizens' support (or lack of support) for a Regional Arterial Program. The inter-active environment of the focus groups also allows visual presentation of information, such as lists or maps of potential capital improvements or prototype public outreach materials.
4. Follow-up Focus Groups. Four follow-up focus groups will be conducted: with likely to vote registered voters in Clackamas, Multnomah and Washington County, and region-wide. The purpose of the follow-up groups will be to further explore perceptions of transportation problems and possible solutions, program themes of greatest interest to citizens, and gauge reaction to potential funding sources.

5. **Telephone Survey of 400 Registered Voters.** A second telephone survey will be fielded to further evaluate current public support for addressing critical regional transportation needs. Public reaction to different funding options, including a local option vehicle registration fee, will also be tested.

Following a pre-test with 25 voters, the survey instrument will be modified as necessary. The 400 sample survey will be administered from a central telephone facility, on evenings and weekends to reach working voters. The survey will be completed in two weeks to ensure a consistent response timeframe. Survey results are data entered separate from interviewing to allow 100% verification; a strength over on-line interviewing. Results will be reported in both an easy-to-read data run format, including up to 20 data cross-tabulations; and a written report with research conclusions and recommendations. An executive summary will be prepared for oral presentation.

**Products:** Public attitude survey and focus group results, with accompanying analysis and recommendations presented to the Regional Arterial Fund Group, TPAC and JPACT.

Additional amounts for contract amendment are:

Barney & Worth, Inc.	\$ 1,409
McArthur & Associates	10,411
Davis & Hibbits, Inc.	16,000
Direct Expenses	<u>80</u>
Total	\$27,900

**BUDGET SUMMARY: REGIONAL ARTERIAL PROJECT**

updated 1/26/98

Task No.	Task Description	Barney & Worth, Inc.			PFM				CH2M HIN			McAA* (OBE)	D&H, Inc.**	F&H (OBE)		CFM	Labor Cost by Task	
		CW	TD	Cler.	MG	PC	CP	KN	RK	RL	GE	MM	AD	LH	SS	GC		
A	Project Management	\$28,378	\$5,679	\$2,251		\$3,133			\$2,285			\$1,200			\$1,900		\$2,812	\$45,518
B	Public Attitude Survey	\$1,875		\$76	\$458	\$369						\$30,873	\$18,000				\$2,812	\$52,482
C	Program Development	\$19,184	\$4,771	\$2,404	\$6,813	\$1,280			\$4,153			\$595		\$9,500			\$18,773	\$65,283
D	Engineering & Cost Stand.	\$1,885	\$847	\$305					\$503	\$21,847	\$3,575							\$28,742
E	Financial Plan	\$1,465	\$162	\$305	\$684	\$6,451	\$13,058	\$9,841							\$2,850	\$960		\$35,776
F	Public Information Materials	\$3,597	\$6,388	\$954													\$2,210	\$13,149
	Person Hours	408	217	165	34	61	110	128	55	201	43	n/a	n/a	150	24	245	1839	
	Hourly Labor Rate	\$133.22	\$80.88	\$58.18	\$228.05	\$184.32	\$118.71	\$78.10	\$125.85	\$108.69	\$83.13	n/a	n/a	\$85.00	\$40.00	\$100.44		
	<b>TOTALS</b>	<b>\$54,354</b>	<b>\$17,547</b>	<b>\$8,298</b>	<b>\$7,754</b>	<b>\$11,244</b>	<b>\$13,058</b>	<b>\$9,841</b>	<b>\$8,922</b>	<b>\$21,847</b>	<b>\$3,575</b>	<b>\$32,668</b>	<b>\$18,000</b>	<b>\$14,250</b>	<b>\$960</b>	<b>\$24,608</b>		
	Firm Total	\$78,197			\$41,898				\$32,343			\$32,668	\$18,000	\$19,210		\$24,608	\$240,922	
	Firm %	32.46%			17.39%				13.42%			13.56%	6.64%	6.31%		10.21%	100.00%	

Direct Expenses	Total
Reproduction	\$4,200
Travel & Per Diem	\$1,600
Local Travel	\$630
Telephone	\$400
Postage/Delivery	\$1,050
Meeting Expenses	\$900
Graphics	\$3,000**
<b>TOTAL</b>	<b>\$11,780</b>

\* Figures for McArthur & Associates and Davis and Hibbits, Inc. includes all costs of data collection.

\*\* OBE graphics consultant

## STAFF REPORT

### CONSIDERATION OF RESOLUTION NO. 96-2272 FOR THE PURPOSE OF AMENDING THE CONTRACT BETWEEN METRO AND BARNEY & WORTH (CONTRACT NO. 904404) FOR CONSULTANT SERVICES ASSOCIATED WITH THE COMPLETION OF THE PORTLAND METROPOLITAN AREA ARTERIAL FUND PROGRAM

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Date: January 24, 1996

Presented by: Andrew Cotugno

## PROPOSED ACTION

Approval to amend the existing contract (Contract No. 904404) "between Metro and Barney & Worth Inc. for consultant services associated with the completion of the Portland Metropolitan Area Arterial Fund Program. This resolution would increase the contract value by \$27,900."

## FACTUAL BACKGROUND

Amendment of the existing contract (Contract No. 904404) is necessary due to the need to expand Task B (Public Attitude Surveys) in the Scope of Work. In July 1995, Metro executed a contract with Barney & Worth Inc. for \$224,800 for consult "services" for the Arterial Fund Program. During December 1995 and January 1996, as work progressed on the development of a comprehensive program of regional arterial, bridge, freight access and pedestrian improvements, Metro Planning staff and the Regional Arterial Fund Group reached the conclusion that additional consultant resources would be necessary.

As the program progressed, the importance of focus groups and public surveys in determining the acceptability of various finding sources and the types of project improvements that are most important to the public became more apparent. Two focus groups of 10 likely-to-vote registered voters each were conducted in the fall of 1995. Fifteen thousand public informational mailers with comment cards, and six open houses were held in December 1995 to obtain public feedback on the program. The findings of the focus groups and the other public input convinced the JPACT Finance Committee that more time and resources were needed to identify an appropriate program, and to determine which types of projects were most important to the public to consider in a ballot measure.

In early January 1996, the Regional Arterial Fund Staff Group identified the need to conduct four more focus groups of motivated voters, which will consist of one group from each of the three counties, and one region-wide group. The focus groups will help test program strategies, types of projects that reflect citizen priorities, and alternative funding sources (regional gas tax, regional vehicle registration fee, etc.) for the program. The program will need to be revised based on the evaluation of focus group responses and a resulting program strategy. The Regional Arterial

Fund Staff Group also identified the need to conduct a survey of 400 motivated voters to determine voter support for the program strategy and various funding sources.

As a result of the need to expand the focus groups and public survey work, the consultant contract would be increased by \$27,900 to a new total of \$252,700. This represents a shift in existing federal planning resources budgeted for Transportation Finance purposes and is not a request for new funds. Also, it should be noted that Barney & Worth Inc. has performed the requested Scope of Work to Metro's specification within the terms of the contract.

Section 2.04.054(a) (3) of the Metro Code requires that, "For Personal Services contracts, any contract amendment or extension exceeding \$10,000 shall not be approved unless the Contract Review Board shall have specifically exempted the contract amendment from the competitive procurement procedures of Section 2.04.53."

Metro Council, acting as Contract Review Board, is hereby requested to specifically exempt this amendment from competitive procurement procedures of Section 2.04.053 and thereby authorizes the Executive Officer to execute this contract amendment.

#### EXECUTIVE OFFICER RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 96-2272.