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**Item No. 14.1.4**  
**Halifax Regional Council**  
**July 19, 2016**

Mayor Savage and Members of Halifax Regional Council

Original Signed by 

**SUBMITTED BY:**

John Traves, Q.C. Acting Chief Administrative Officer

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Jane Fraser, Acting Deputy Chief Administrative Officer

**DATE:** June 22, 2016

**SUBJECT:** Sole Source Award – Regional Household Travel Survey

### **ORIGIN**

Planning & Development deliverables for 2015 include PD 5.35: “Measures will be taken to strengthen the regional transportation demand model (VISUM) through the undertaking of a travel demand survey and installation of on-street traffic data collection devices. This work will be done in partnership with Dalhousie University (DalTRAC)”. The approved 2016-17 Planning & Development operating budget includes funding to undertake this work.

### **LEGISLATIVE AUTHORITY**

Under the HRM Charter, Section 79, Regional Council may expend money for municipal purposes. Administrative Order #35 (Procurement Policy) requires Regional Council to approve the awards of contract for sole source purchases exceeding \$50,000. This report conforms to the above Policy and Charter.

Administrative Order 35, subsection 8 (11) (k), indicates that a sole source approach can be used to procure services from a public agency.

### **RECOMMENDATION**

It is recommended that Halifax Regional Council, in accordance with the Sole Source Policy (Administrative Order 35, Section 8(11A), subsections ((k) attached), award the sole source undertaking of a Regional Household Travel Survey to the Dalhousie Transportation Collaboratory (DalTRAC) at a cost of \$312,552 (including net HST) with funding from cost centre R951 (Order MPLAN005) as outlined in the Financial Implications section of this report.

## **BACKGROUND**

At its January 28, 2014 meeting, Halifax Regional Council recommended approval of “the attached MOU between HRM, Metro Universities and the NSCC and endorse the Mayor signing the MOU on Council’s behalf and direct implementation of its initiatives to begin.” The MOU included building on an MOU adopted in 2005 which recommended the pursuit of collaborative opportunities including:

- participation in development of a Cultural Policy for HRM
- collaboration on an Immigration Action Plan/Strategy
- support to HRM on recreation policy and programming
- improved transportation connections
- community policing
- strategic planning
- shared use of facilities

In 2011, HRM began using a new regional roadway network model called VISUM. Since that time, significant effort has gone into building and calibrating the model. It has been applied as a critical analysis tool in a number of important studies including the Regional Plan Update (RP+5), the Moving Forward Together Plan, the Commuter Rail Feasibility Study and the Bedford-Mainland North Corridor Study. The model is only truly effective and defensible when it is calibrated to detailed and up-to-date travel data. This data is normally collected through regional household travel surveys such as the one described in this report.

## **DISCUSSION**

A Regional Household Travel Survey is a perfect opportunity for the Municipality to establish the type of strategic planning collaborative partnership described in the MOU identified in the Background section above.

Travel surveys are critical for cities to develop network models, provide knowledge for evidence-based decision making, monitor the performance of the roadway and transit networks, and track progress in sustainable travel behaviour. The information will be useful in helping Halifax Transit develop more sophisticated ridership projections, and it will also provide good background data to help the Municipality strategically increase modal split of sustainable forms of transportation and monitor progress. Accurate demand modeling is a critical tool in evaluating project cost-effectiveness and in setting Capital Cost Contribution charges. While most major cities in Canada undertake travel surveys regularly, one has not been undertaken in the Halifax Area since the mid-1980’s. Furthermore, most cities in Canada that do undertake surveys of this nature do so in partnership with local universities.

The Dalhousie Transportation Collaboratory (DalTRAC) is uniquely positioned and motivated to undertake this work. Dr. Ahsan Habib, an Associate Professor in the School of Planning and Department of Civil and Resource Engineering at Dalhousie leads the project. In his time at the University of Toronto, Dr. Habib was a key player in the implementation of the Greater Toronto Area’s Transportation Tomorrow Survey, a comprehensive travel survey conducted every five years since 1986. Dalhousie University possesses the high-capacity computer servers and workstations necessary to ensure secure data collection. In addition to generating important information for the Municipality, the survey will provide data that will feed into important research being undertaken by the University. In recognition of this, DalTRAC proposes to contribute in-kind staff time and computing resources over and above the project budget. The added value of this supporting academic research is something that could not be provided by a private sector firm.

The survey proposed will provide detailed household-level travel activity information to develop multiple components of the transportation network modelling systems, including trip generation, trip distribution, mode choices (automobile, transit, active transportation, etc) and destination choices. The survey will use

a multi-instrument data collection approach, including customized computer-assisted web interviews and telephone interviews. A random sample of 10,000 households across Halifax will be invited to participate in the survey with an objective of the completed responses representing a 2.5% sample of the region.

Normally, surveys of this nature are undertaken every five years. It is our intention to do the same with this survey, although the award proposed by this report deals only with the initial survey that will be undertaken in Fall 2016.

### **FINANCIAL IMPLICATIONS**

The cost of the Sole Source Agreement with the Dalhousie Transportation Collaboratory (DalTRAC) is \$299,707 plus net HST of \$12,845 for a total cost of \$312,552. The cost of this agreement can be accommodated within cost centre R951, Strategic Transportation Planning, Planning & Development (Order MPLAN005). This project was previously approved for funding from the Strategic Studies Reserve, Q330, and has an available balance of \$375,541. Budget has been confirmed by Finance.

#### **Budget Summary, MPLAN005 (Funded from Q330)**

2015/16 approved amount	\$655,100
2015/16 amount returned to reserve	<u>(\$223,100)</u>
Available	\$432,000
This award per recommendation	(\$312,552)
Balance of MPLAN0005 following award	\$119,448

#### **Strategic Studies Reserve, Q330, (June 2, 2015)**

Reserve is intended to provide funding to support organizational research for policy direction and long-term municipal planning. Studies' deliverables will provide evidence-based research to direct staff to write policy which will redefine business needs for a regional impact. Annual funding to the reserve is an allocation from fiscal services. The approval of the recommendation does not have a negative impact on the anticipated reserve balances as this amount was already approved as a withdrawal in the 2015/16 and 2016/17 reserve budget, so there is no further impact to the reserve

### **RISK CONSIDERATION**

With all agreements of this nature, there is risk that the project may be delayed or not completed at all. This will be managed by developing a strong project terms of reference and appointing an internal project manager with sufficient resources to carefully track project progress.

There is also risk in not proceeding with a Regional Household Travel Survey. The Integrated Mobility Plan and other strategic investment and planning decisions are based on a well-founded knowledge of what the mobility demands in the region are. Without this knowledge, future decisions may not properly address the true needs of the Region and investments may not have optimal value.

### **COMMUNITY ENGAGEMENT**

No community engagement is planned beyond the engagement achieved through the survey.

### **ENVIRONMENTAL IMPLICATIONS**

There are no environmental implications to undertaking the travel survey. Data generated by the survey is expected to be beneficial in the evaluation of environmental implications due to transportation.

**ALTERNATIVES**

Regional Council may choose to forego undertaking a Regional Household Travel Survey or to have it done through a means other than the sole source award to DalTRAC. This is not recommended, as the value of added-value research and an opportunity to develop a strategic planning collaboration as outline in the MOU between HRM, Metro Universities and the NSCC would be lost.

**ATTACHMENTS**

- Attachment A: Procurement Policy Section 8(11)A
- Attachment B: DalTRAC Proposal for Partnership: Household Travel Activity Survey
- Attachment C: Proposed Project Budget

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A copy of this report can be obtained online at <http://www.halifax.ca/commcoun/index.php> then choose the appropriate Community Council and meeting date, or by contacting the Office of the Municipal Clerk at 902.490.4210, or Fax 902.490.4208.

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**Attachment A  
Administrative Order 35  
Procurement Policy Section 8 (11) (A)  
Sole Source/Single Source Purchases**

(11) **Alternative Procurement Practices** may be used as follows:

A. Sole Source/Single Source Purchases. These occur:

- (a) To ensure compatibility with existing products, to recognize exclusive rights, such as exclusive licences, copyright and patent rights, or to maintain specialized products that must be maintained by the manufacturer or its representative.
- (b) Where there is an absence of competition for technical reasons and the goods or services can be supplied only by a particular supplier and no alternative or substitute exists.
- (c) For the procurement of goods or services the supply of which is controlled by a supplier that is a statutory monopoly.
- (d) For the purchase of goods on a commodity market.
- (e) For work to be performed on or about a leased building or portions thereof that may be performed only by the lessor.
- (f) For work to be performed on property by a contractor according to provisions of a warranty or guarantee held in respect of the property or the original work.
- (g) For the procurement of a prototype of a first good or service to be developed in the course of and for a particular contract for research, experiment, study or original development, but not for any subsequent purchases.
- (h) For the purchase of goods under exceptionally advantageous circumstances such as bankruptcy or receivership
- (i) For the procurement of original works of art.
- (j) For the procurement of goods intended for resale to the public.
- (k) For the procurement from a public body or a not-for-profit corporation.
- (l) For the procurement of goods or services for the purpose of evaluating or piloting new or innovative technology with demonstrated environmental, economic or social benefits when compared to conventional technology, but not for any subsequent purchases.

The terms and conditions of a sole source/single source purchase shall be negotiated. Sole source/single source purchases over \$25,000 and not exceeding \$50,000 shall be approved by the CAO.