



## **SANDAG SERVICE BUREAU**

The SANDAG Service Bureau provides informational and technical services to member agencies, nonmember government agencies, and private organizations and individuals. It is the purpose of the Service Bureau to offer products and services that meet the needs of decision makers in the public and private sectors while enhancing the quality and extent of demographic, economic, transportation, land use, criminal justice, and other information maintained in our Regional Information System (RIS). The Service Bureau may provide services through SANDAG and the SourcePoint Corporation.

The SANDAG Executive Committee serves as the Service Bureau's governing body and the Board of Directors of SourcePoint.

### ***Project Priorities and Procedures***

1. In the event that the Service Bureau is unable to respond to the number of requests for service with the available staff and other resources, the Executive Committee will be asked to set project priorities.
2. Should the meeting schedule for the Service Bureau Board cause delay that might be detrimental to the request, SANDAG's Executive Director will direct project priorities and report back to the Executive Committee at its next meeting.
3. The Service Bureau reserves the right to deny any request for service that is beyond the capabilities of SANDAG staff, data, or models.
4. The Service Bureau may respond to Requests for Proposals from public and private sources. Where appropriate, the Service Bureau may subcontract with consulting firms, following established fair business practices and SANDAG's procurement procedures.
5. All policies and procedures of SANDAG will be followed, and all final work products of the Service Bureau will be subject to public disclosure pursuant to the California Public Records Act.
6. Travel demand models used for Service Bureau requests will be supported for an eight-year lifecycle. The Service Bureau will support the current version of the travel demand model adopted by the SANDAG Board of Directors as part of the most recent Regional Plan, as well as the most recent previous travel demand model. Model expiration dates will be tied to the adoption dates of regional plans. All new requests for modeling services will be conducted using the current version of the transportation model.

**Fees, Charges, and Pricing Policies**

1. It is the Board’s policy that the Service Bureau will seek compensation for the direct and indirect costs necessary to provide services and to maintain and enhance the Regional Information System (RIS).
2. SANDAG’s Executive Director will be responsible for establishing a fee schedule for all services provided by the Service Bureau.
3. SANDAG’s Executive Director will review the fee schedule annually and revise as necessary to ensure full cost recovery of services rendered.
4. Fees will be based upon competitive market rates. The elements that will be used to calculate the cost of any service provided through the Service Bureau will include, but are not limited to, the following:

Direct Costs

- Direct Labor
- Fringe Benefits
- Materials and Supplies
- Printing and Graphics

Indirect Costs

- General and Administrative Overhead
- Program Management
- Program Marketing
- Regional Information System Maintenance and Enhancement Fee

5. All agreements to perform Service Bureau work will be in writing and signed by an authorized officer of the client and SANDAG or SourcePoint prior to commencing any work. At a minimum all such agreements will include the cost, scope, and schedule of the work to be performed.
6. There will be appropriate charges made to cover costs for administration of all contracts or services that pass through funds to other organizations.

**SANDAG Member Agencies**

For voting member agencies of the SANDAG Board of Directors, projects requiring three hours or less of SANDAG staff time will be completed at no charge. All projects requiring more than three hours of SANDAG staff time will be fully reimbursed by the requesting agency.

**Conflicts**

1. Nothing in these policy guidelines is intended to prevent or delay the efficient and effective delivery of service to any client. SANDAG’s Executive Director has the responsibility of interpreting the policy in as fair and practical a manner as possible.
2. The Service Bureau will deny all requests from other than voting member agencies for services dealing with a legislative matter, proposition, initiative, referendum, or candidate for public office if the subject matter of the request is or is reasonably expected to be the subject of any

filing with the San Diego County Registrar of Voters or applicable filing authority regarding an upcoming election.

3. The Service Bureau reserves the right to refuse any request for service that it determines is, or may be, in conflict with SANDAG and SourcePoint policies and bylaws.
4. Any denial of a Service Bureau project request may be appealed to the Executive Committee.

***SourcePoint: Nonprofit Arm of the Service Bureau***

SourcePoint was created by SANDAG in 1982 as a nonprofit corporation. SourcePoint operates within the Service Bureau as an option for those who are required or prefer to contract with a nonprofit agency. Maintaining a nonprofit status also provides flexibility for SANDAG in applying for and accepting certain grants.

1. SourcePoint fees, services, and project priorities will be identical to those for other Service Bureau projects.
2. By mutual agreement, SANDAG will provide staff and other services to SourcePoint on a project-by-project basis, subject to full cost reimbursement for said services.
3. SourcePoint will provide SANDAG any service, assistance, or information requested by SANDAG at no cost to SANDAG.

***Progress Reports***

The Executive Director will periodically provide progress reports on the project activities and financial status of the Service Bureau to the Executive Committee. The Executive Committee will provide an annual progress report to the SANDAG Board of Directors.

Adopted June 2003

Amended May 2005

Amended January 2010

Amended February 2018