SUBJECT: AUTHORIZATION TO PURCHASE ADDITIONAL ROUTEMATCH PASSENGER INFORMATION MODULES

SOURCE: Public Works Department - Transit

COMMENT: On May 1, 2012, the City Council approved staff to negotiate the sole source procurement of the RouteMatch scheduling and passenger information system due to their ability to provide a fully integrated solution using a single database and the ability to add additional components to their system without purchasing a new system or additional 3rd party equipment. With Council's direction, staff negotiated the price of the software package and began installing the software in July of 2012.

As the RouteMatch system was being implemented, in conjunction with the new bus stop sign program, it became evident to staff that additional modules should be purchased, if funding was available, to enhance the passengers overall experience. Specifically, staff is interested in procuring three (3) additional RouteMatch modules which will increase the overall efficiency of Porterville's entire transit operations and provide riders another means to access real time information, thereby increasing the rider's use of and overall satisfaction with the City's transit system.

The three additional modules staff is interested in procuring is: (1) Paratransit Notification Module, this module interacts with the existing RouteMatch database to provide paratransit passengers with advanced trip confirmation scheduling capabilities and real time arrival notices; (2) BusLine Notification Module, this module interacts with the existing RouteMatch database to automate the transit center phone system, providing transit customers with next bus, schedule and other transit information; and (3) Fixed Route Display Module, this module interacts with the existing RouteMatch database to allow staff to easily configure and manage digital displays located at the transit center, notifying customers when the next bus will arrive.

If authorized, the cost of the three additional modules will be $159,450, with a 10% contingency, bringing the total cost of the additional modules not to exceed $175,395. This project will be funded in full from Transit's FY 2012/2013 Prop 1B grant, which was advanced through Measure R and is readily available.

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Staff estimates that it would take up to three months to implement the three additional modules.

RECOMMENDATION: That the City Council:

1) Authorize staff to begin negotiations for the purchase of the three additional RouteMatch modules; and

2) Authorize payment upon satisfactory delivery of the equipment.

ATTACHMENT: RouteMatch Software Proposal
May 1, 2012 Staff Report

RouteMatch *Software*
Proposal

Proposal Response To:
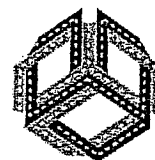
City of Porterville

Submitted By:

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Denver, CO 80202
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www.routematch.com

Submitted On:

February 8, 2013
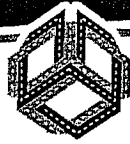
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Contents

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1.0 Introduction

RouteMatch Software is pleased to provide the following proposal for various turn-key components to City of Porterville's current RouteMatch Transportation Management System. RouteMatch has carefully reviewed the requirements of your project and is very confident our solutions combined with our excellent project team will provide your organization and extremely valuable solution and assist in leveraging technology to automate your operations.

1.1 Scope of Services

The Scope of Services for this engagement consists of the following components:

1. **RouteMatch Paratransit Notification Module**
    a. Floodgate Messaging, Night-before Reminders and Pre-Arrival Notifications
    b. Up to 50,000 Calls, Emails and SMS Texts annually
    c. Professional Services for Project Management, Configuration, Implementation and Training
    d. Required Support & Maintenance Program

2. **RouteMatch Display System**
    a. Licensing for three (3) displays
    b. Professional Services for Project Management, Configuration, Implementation and Training
    c. Required Support & Maintenance Program

3. **BusLine Fixed Route IVR System**
    a. 4 Port IVR System
    b. Fixed Route Integration with GTFS for Scheduled Times
    c. Nuance Text-to-Speech – English & Spanish
    d. Implementation & Project Manager Fees
    e. Telephony Hardware & Warranty & Maintenance Options

These items are further summarized below.

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2.0 Product Description

2.1 RouteMatch Paratransit Notification Module

The RouteMatch Notification Module interacts with phone systems and email exchange servers to provide your customers with trip confirmation notification and real time arrival notices. Transit systems can configure the system to deliver automated call-backs to customers to remind them of schedules, service issues, or reminders. If combined with your AVL system, consumers can access the phone for real-time "where's my ride" information. RouteMatch developed the Notification Module for a flexible, targeted technology solution to initiate contact with riders.

The RouteMatch Notification Module uses a flexible, customizable approach to manage proactive, agency initiated messages to riders about trips or general service updates. The technology uses four (4) methods for communication which can be customized to each rider according to their communication preferences: Phone, Email, SMS (Text), or Fax. In addition, RouteMatch stores multiple phone numbers and email address so that, with prior authorization, notifications can be sent to interested family members or care givers about a passenger's trip.

Key features:

- Automated call-backs to customers to notify them of schedule changes, service disruptions, or emergency alerts.
- Multi-language support.
- Allows users to access call center 24/7/365.
- Integrate to AVL system for real time "where's my ride" and arrival notification.

Key benefits:

- Improve system accessibility to your customers.
- Improve operational efficiencies of call centers and labor required to communicate to your customers.
- Improve customer satisfaction by providing more options to your service.
- Reduce no-shows and dwell time using the Arrival Notification feature of the system.

Notifications

The Notification module is used to create "Notification Groups" that allow you to schedule and send your notifications based on the options you have set for each recipient. When you set up a group, you have the ability to use a Criteria Editor to build criteria that RouteMatch TS uses to choose which recipients the notification is sent to.

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The message itself is template-based and uses a combination of entered text and tags that populate the message from data from the RouteMatch database. After messages are configured, use the Monitor Notification tab to view which messages have been sent and which are scheduled to go out.
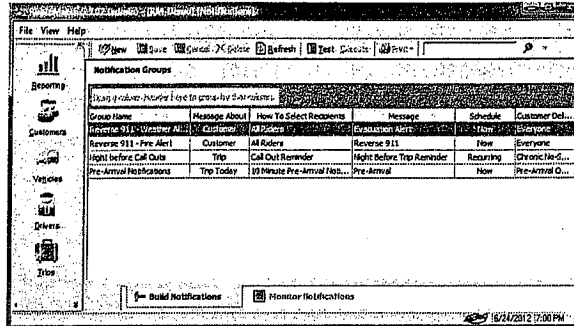
Notification Groups

Notification Delivery Catagories

These categories are configured in the Notification Options of the Settings module and are the basis of how customers and addresses are configured to receive messages. These categories are entered as free text and have no further settings. All other configuration is done through the other parts of the notification process. When creating the category, you should plan how the notifications are going to be used and for what reason you are going to be contacting your clients. For example, you could configure a category called —Flood Gate to send a message to all active clients and addresses, or you could create a —Trip Based category to determine how customers would need to be notified about their upcoming trips.

Notification Options	
Notification Default Time Span	1 Day
Notification Delivery Categories	<Sub Form>
Default Notification Delivery Category for Customers	Everyone
S M S Message Length	160
Default Notification Delivery Category for IVR Callout	Everyone
Notification Outbound Email Sender Address	info@routematch.com
S M S Long Message Option	Multiple Messages

Delivery Catagories

Configuring Recipients

It is important to remember that by default, no customers or addresses are configured to receive notifications. Each customer or address that has opted-in has to be configured before any notifications are sent to them. You can have messages sent to individual customers if they handle their own transit requests or you can have messages sent to addresses to notify doctor's offices, group homes, or anyone else who may handle transit request or pickup or dropoff destinations.

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Manage Notifications directly from RM Customer module

Client Level Notification Management

Creating Messages

Use the Notification module to craft the message, the message schedule, and the message criteria that identifies who the message should be sent to. Messages can be sent —on demand , according to a calendar, or on a recurring basis. They can also be sent —as needed when the message pertains to a trip.

Scheduling Messages

There are two ways of thinking about recurring scheduled messages. For customers and addresses, this is how often a single message is sent to that entity. You should be careful to not send too many messages as this could frustrate the customer and could cost them money in terms of data and message charges from their mobile carrier. The message criteria is fairly loose for these message types, so they system sends your message to everyone that matches the criteria you set up.
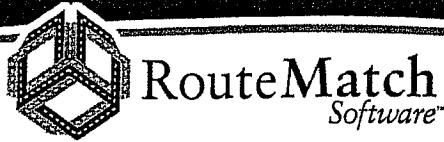
In terms of recurring trip messages, the system doesn't send the message each time the criteria are met. Instead, the message is queued and sent only once for the criteria you configure. The schedule you are setting up is how often RouteMatch TS checks to see if a message should be sent about the trips.

For more information, see the following section, How to create a message.

Criteia Editor

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Criteria Editor(by row)

Message Template Editor

Testing Notifications

The Notification module allows you to send a test message to a single recipient to make sure what you are sending to your clients is what you expect to send.

Applies To: Trip   Template Used: Night Before Trip Reminder

Trip Confirmation Number: Trip Date: 6 /24/2012

Specify Contact Information
○ Use Defined Address Information   ○ Enter One Time Usage Information

Set Up Notification As:
○ Phone   ○ Email   ○ Fax   ○ SMS   Please select one it ▼

Enter Phone Number To Use:

Notify

Cancel

Testing Options

Monitoring Notifications

The Monitor Notifications tab lists all notification messages that have been sent or are in the message queue during a given date range.

To use the tab, select the start and end of the date range and click the Refresh button to search for notifications that occurred during that time period. The messages display:

The Group Name, the Recipient Name, the number or address of the message type, the current status of the notification, the number of retries that have been made in sending the message and the complete text of the message that was sent.

File View Help

Reporting

Customers

Vehicles

Notification Status   Date Range: 7 / 5 /2012 ▼ To: 7 / 6 /2012 ▼

Group Name /

Group Name	Message About	How To Select Recipients	Message	Schedule	Customer Del...
Reverse 911 - Weather A...	Customer	All Riders	Evacuation Alert	Now	Everyone
Reverse 911 - Fire Alert	Customer	All Riders	Reverse 911	Now	Everyone
Night before Call Outs	Trip	Call Out Reminder	Night Before Trip Reminder	Recurring	Chronic No-S...
Pre-Arrival Notifications	Trip Today	10 Minute Pre-Arrival Not...	Pre-Arrival	Now	Pre-Arrival O...

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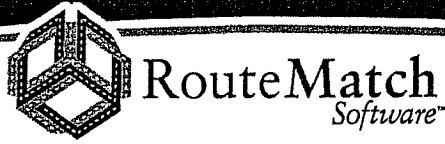
2.2 RouteMatch Display Module

The RouteMatch Display Module allows staff to easily configure and manage signs located at transfer centers, major depots, and bus stops directly from RouteMatch CA. Any stop can have one or multiple signs associated with it. The signs can be LCD, LED, or a Kiosk. RouteMatch simply needs a device with an IP address that it can connect with. RouteMatch can connect to multiple sign types and communication methods including: Ethernet, WiFi, and/or cellular modems.

Users simply search for the stop they would like to attach a sign to using our Stop Management tools. Users check the box "This is a stop with a Sign". The user interface below is then displayed:

HTML Templates are provided for agency customization. This gives an extremely flexible environment to customize the look, feel, and content of each sign. Each display could have different appearances based on audience and target markets. Weather, advertising, and emergency response systems can be easily integrated into each wayside sign. Once templates are edited, users can preview the sign by selecting the PREVIEW button.

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2.3   BusLine Fixed Route IVR System

FIXED ROUTE TRAVELER INFORMATION

BusLine automates transit call centers by providing public transit riders with automated next bus, schedule and other transit information.

BENEFITS

Cost Savings
Call center capacity increases without adding staff. Agents can focus on complex inquiries. BusLine reduces the overall cost per call.

Better Customer Service
Riders have convenient 24/7 access to transit information. Busy signals and hold times are reduced or eliminated.

Easy to Install and Maintain
BusLine integrates seamlessly with your scheduling and operating environment. BusLine also integrates with HandyLine and TripFinder.

Scalable
BusLine can scale to handle any call volume.

Configurable
Change bulletins, surveys, or agent settings at any time.

STANDARD FEATURES

Next Bus Times
Riders select a timing point or numbered stop, and BusLine returns the next times that the bus passes the location.

Schedule Lookup
Riders select a route, day and time and BusLine provides schedules at timing points for that route.

Bulletins
Announce special events, emergency information, delays, and detours to riders. Bulletins can be generic or specific to the route, date or time.

Surveys
Configure surveys to poll your riders on any subject and receive detailed feedback on the results.

System Reports
View or print detailed BusLine usage statistics.

Control Center
The Control Center is a sophisticated administrative tool for configuring BusLine without system downtime.

OPTIONAL FEATURES

Stop Level Information
BusLine provides schedules and next bus times for each individual stop.

AVL Integration
When BusLine is integrated with your Automatic Vehicle Location (AVL) system, riders receive real-time schedule and next bus times, adjusted for delays.

Computer Technology Integration (CTI)
Provides call center agents with the collected call detail allowing the customer's query to be handled more efficiently.

Pass and Ticket Sales
Riders can place orders for tickets without speaking to an agent. Reports are generated for order fulfillment.

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Core IVR Functionality

- ❖ Web-Based Control Center
- ❖ 2 ports of Nuance / Loquendo Tier 3 Speech Recognition and 2 Text-to-Speech Licenses (English & Spanish Only)
  - ➢ Bus Stop Names (can be optionally recorded)
  - ➢ Spanish translation is the responsibility of Porterville
  - ➢ Professional translation are available at additional cost
  - ➢ Route / Pattern Names
- ❖ PrEditor 2 – Prompt Editing Recording Tool
- ❖ Speech Blocks & Voice Forms – allowing City of Porterville to simply make changes to IVR Content
- ❖ Floodgate Messaging, Special Announcement, and General Information Menus (FAQ's)
- ❖ SIP Trunking
- ❖ Windows 2008R2 and Microsoft SQL Server 2008 Express Support
- ❖ Full set of Standard Reports for auditing and usage statistics
- ❖ Global grammar for detecting zero out, repeat, and main menu. (0,*,9 in DTMF)
- ❖ Error Recovery and help – 3 levels of fallback when reprompting including ability to transfer to agent.

Fixed Route Functionality

- ❖ Integration with ROUTEMATCH RMXS API for communication of real-time
- ❖ bus arrival information at the stop level.
  - ➢ Integration with ROUTEMATCH or AGENCIES database for scheduled times
  - ➢ Self-Service Customer Information to handle inquiries
  - ➢ Configurable Call Routing Schedules
- ❖ Agent Language Skills
- ❖ Open / Closed Messages on Transfer
- ❖ Holiday Exceptions
- ❖ Conditional Routing based on time of day
- ❖ Arrival Times by Stop ID or Stop Name
- ❖ Future Scheduled Arrival Times
- ❖ Find My Stop Functionality by Intersection
- ❖ General Information / Floodgate Messaging
- ❖ Identification of First and Last Trips of Day
- ❖ Configurable content for speaking trip information
  - ➢ Route Name, Route Number, Pattern Name, Direction
  - ➢ Number of times to speak out
  - ➢ Times organized by route or arrival time

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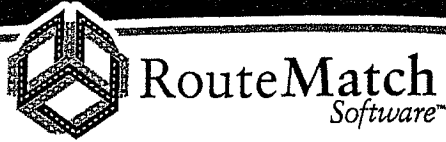
3.0 Cost Proposal

3.1   Pricing Summary

Project	Capital Cost
Paratransit Notification Module	$38,160
RouteShout Display System	$14,380
BusLine Fixed Route IVR System	$84,200
Total	$136,740

3.2   RouteMatch Notification Module

For this scenario, the proposal assumes:
- RouteMatch Notification Module
  - Floodgate Messaging, Night-before and pre-arrival reminders
  - Up to 50,000 Calls, Emails and/or SMS Texts annually

RouteMatch Software – Base License Fees	
Notification Module License Fees	$24,500
Sub-Total	*$24,500*
RouteMatch Software Implementation Services	
Notification Professional Services	$10,560
Telephony Fees (includes English & Spanish) – Year 1	$1,500
Travel (1 trip)	$1,600
Sub-Total	*$13,660*
TOTAL	$38,160
Premium Support & Maintenance	
First Year Premium Support and Maintenance Program	Included
Ongoing Annual Premium Support and Maintenance Program	$2,450
Annual Telephony Fees (includes English & Spanish)	$1,500

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3.3 RouteMatch Display System

For this scenario, the proposal assumes:
- Licensing for three (3) displays
- Professional Services for Project Management, Configuration, Implementation and Training

RouteMatch Software – Base License Fees	
RouteMatch Display License Fees	$7,500
Sub-Total	*$7,500*
RouteMatch Software Implementation Services	
Display Professional Services	$5,280
Travel (1 trip)	$1,600
Sub-Total	*$6,880*
TOTAL	$14,380
Premium Support & Maintenance	
First Year Premium Support and Maintenance Program	Included
Ongoing Annual Premium Support and Maintenance Program	$1,125

3.4 BusLine Fixed Route IVR System

For this scenario, the proposal assumes:
- 4 Port IVR System - Nuance Text-to-Speech
- Professional Services for Project Management, Configuration, Implementation and Training

RouteMatch Software – Base License Fees	
BusLine IVR System Fees	$42,800
Sub-Total	*$42,800*
RouteMatch Software Implementation Services	
Implementation & Professional Services	$37,400
Travel (1 trip)	$4,000
Sub-Total	*$41,400*
TOTAL	$84,200
Premium Support & Maintenance	
90 Day Warranty	Included
OPTIONAL 1 Year Extended Warranty	$7,134
OPTIONAL Ongoing Extended Warranty	$9,704

3.1 BusLine Fixed Route IVR System

Optional IVR Components	
Additional Port	$2,400
Analog – Audiocodes MP118 – 8 port with IP PBX	$890

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4.0 Acceptance Page

This proposal serves as a change to the original scope of this project. This proposal will also be considered an addendum and is subject to the original Hardware, Software License, and Service Agreement Between RouteMatch Software, Inc., and City of Porterville. It will assume the terms and conditions as set forth in this executed contract. If accepted, please have an authorized official to sign and return. Upon receipt of the accepted quote, RouteMatch will authorize the above describe product and/or services to be delivered to City of Porterville.

_____   _____
Authorized Signature   Date

_____
Printed Name

_____
Organization Name

Please return immediately to the following contact:
Teague Kirkpatrick
RouteMatch Software
teague.kirkpatrick@routematch.com
303.997.1507

SUBJECT: AUTHORIZE STAFF TO APPROVE THE PURCHASE OF DEMAND RESPONSE, FIXED ROUTE AND TRAVELER INFORMATION SYSTEM

SOURCE: Public Works Department - Transit

COMMENT: The Porterville Transit System has provided transportation services as the public transit operator for the Porterville Urbanized Area since 1980. Porterville Transit provided 437,041 trips during Fiscal Year 2010/2011. Transportation is provided to the community in the form of local fixed-route and curb-to-curb Dial-A-Ride services.

Thirty (30) employees provide transportation services twelve (12) hours a day, Monday through Friday, with limited Saturday hours. All components necessary to provide public transportation are housed within the Porterville Transit Center and the City's Corporation Yard. The City maintains and schedules a fleet of nineteen (19) vehicles, including wheelchair accessible mini-vans.

Currently there are only two (2) methods of communication available in the transit vehicles:

- Two-way Radio System
- Limited Global Positioning System (GPS)

The following recommendations were approved by the City Council to improve its intelligent transportation system (ITS).

1) The **Porterville Transit Short Range Transit Plan,** adopted August 2010, states, "Reduce COLT operational costs through improved trip-planning efforts (service efficiency)."

2) The **Tulare County Coordinated Transportation Plan,** adopted July 2010, states, "Develop user-friendly information systems that illustrate available services and trip options, including guides/brochures, kiosks, automated routing services, etc."

In September 2011, the City Council approved the Public Transportation Modernization, Improvement & Service Enhancement Program (PTMISEA) allocation plan for the installation of an automatic dispatch system, automatic vehicle locating system, and passenger information system through the State Proposition 1B bond program – PTMISEA.

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This project will implement both recommendations noted above with the transition from a limited demand response scheduling program. The passenger information system project will acquire, install and support a user-friendly information system that details available services and trip options.

Currently, Porterville Transit uses an outdated method to collect data. Drivers record mileages and trips on paper trip sheets. At the conclusion of the driver's shift, drivers submit the trip sheets to dispatch and dispatchers enter the reportable data into Microsoft Excel.

This process is both labor intensive and prone to human error. With a computer assisted software system, drivers will input data on a touchpad and reportable data is wirelessly downloaded from each vehicle in real-time. This would minimize staff time and significantly reduce errors and improve reporting accuracy.

Additionally, the only passenger information system is the Transit Guide and Google Transit as a way of providing passenger information on the times and locations of services available. During the 2012's "Unmet Transit Needs" hearing, Porterville Transit was asked to provide passenger information at each of its bus stops. Although Porterville Transit does not find this as an unmet need, staff believes this is an operational issue that can be met by this project.

Staff was directed at the Council meeting on March 20, 2012, to 1) develop a list of potential firms, 2) identify the estimated time and/or cost to develop the project specifications, and 3) obtain legal advice on local procurement policies for the sole source procurement of a Demand Response, Fixed-Route and Passenger Information System.

Staff is requesting that the project be completed by one individual firm capable of a providing a complete, fully integrated system, utilizing a single database solution. Staff's research identified only one firm, RouteMatch, which is capable of providing a single database solution. Advantages of utilizing a single database solution is 1) intra-system real-time communication between all components, 2) operational efficiencies through the use of a single user interface, 3) additional cost efficiencies are realized with both implementation and future expansion, and 4) efficient and reliable support utilized from a single vendor.

Staff researched the available intelligent transportation system firms capable of completing the project and has provided Council with the attached compatibility matrix.

Trapeze, one of the systems staff researched, is capable of providing most of staff's required elements, but is located outside of the United States and is not capable of utilizing a single database. Therefore, the operator must log out of one program to use another. Staff believes the use of multiple programs can be problematic and does not increase dispatcher efficiencies.

Staff is particularly interested in the RouteMatch product because of its ability to provide coordinated services without any required upgrade costs. Staff is currently studying the possibilities of coordinating transportation services with providers in our community and the county through the Southeast Tulare County Mobility Study and believes this project will lead the way for increased coordination of all transportation providers in Tulare County.

Staff contacted the City of El Dorado, City of Glendora, City of Ridgecrest and the City of Delano for RouteMatch references and cost analysis. All of the cities highly recommended RouteMatch for its ease of use, reliability, support and immediate time and cost savings to their systems. Also, each of these cities, except for the City of Ridgecrest, did not issue a formal competitive process and their systems were purchased using state or local funds. When analyzing costs, the City of Porterville was below all of the above cities due to the integration between the paratransit, fixed-route and traveler information solutions. Recently, RouteMatch was awarded several state contracts to provide similar systems in the state of Idaho, Montana, Nebraska, North Carolina and Georgia.

Staff also researched the estimated time and cost to develop the detailed specifications required to competitively procure this project. Staff estimated that it would cost $5,000 for our transit consultant to develop the project specifications. Staff is fully capable of developing the project specifications in-house and estimated that it would take approximately two months to develop in-depth project specifications.

Lastly, the City Attorney issued a memorandum discussing whether the City could legally sole source this project. The memorandum stated, "Use of a competitive bidding process is likely not required."

Staff believes that it is unnecessary to go through the time and expense of a competitive proposal process because RouteMatch is the only source which can provide the necessary interface for the complete project. Developing the scope of work and proper specifications will require additional staff time and/or costs to hire a consultant to write the proper specifications. In addition, given that the City currently has the funds and is able to start work on the project immediately, the delay caused by the competitive process, in conjunction with the fact that only RouteMatch can really provide the necessary solution, would be a disadvantage to the City and the public.

Given the integration between RouteMatch's paratransit, fixed-route and traveler information solutions, the cost of this project is greatly reduced. In short, the cost of the software itself is reduced since many components of the software are inter-related (i.e. Customers, Vehicles, Addresses, etc.). In addition, the City's users (dispatchers, drivers, administrators) will be trained on one integrated RouteMatch system and better understand the intricacies of the software.

Staff's recommendation would utilize an exemption from competitive bidding as allowed under City's Purchasing Policy & Procedure Manual, as amended by Resolution No. 122-87, adopted by Council on October 10, 1987. No federal funds will be used in this project, therefore local purchasing rules apply.

Funding sources for this project include $243,017 from Prop 1B and $36,244 from Local Transportation Funding (LTF). The total cost of the project will be $279,261.

Staff estimates that the project will take up to five months to complete.

RECOMMENDATION: That the City Council:

1) Authorize Staff to begin negotiations for the purchase of RouteMatch Software; and

2) Authorize payment upon satisfactory delivery of the equipment.

ATTACHMENTS: 1.   RouteMatch Software Proposal
                2.   Compatibility Matrix
                3.   Legal Memorandum