



**Board of Directors Regular Meeting**  
**Meeting Date:** 5/17/2018  
**Agenda Item No.:** 2018-May-13.

SACOG Board of Directors

**Subject:** Approve Release of a Request for Proposals for Commuter Club and 511 Website Development, Maintenance, and Hosting (Est. time: 0 minutes)

**Consent**

**Prepared by:** Sabrina Bradbury

**Approved by:** James Corless

**Attachments:** Yes

**1. Issue:**

Should SACOG release a Request for Proposals (RFP) for Commuter Club and 511 website development, maintenance, and hosting?

**2. Recommendation:**

The Transportation Committee unanimously recommends that the Board of Directors release an RFP for Commuter Club and 511 Website services.

**3. Background/Analysis:**

The Commuter Club website is a regional database tool utilized by SACOG, Transportation Management Organizations (TMOs), and Employer Transportation Coordinators (ETCs) as a way to provide transportation subsidies, emergency ride home vouchers, and carpool/vanpool matching services. The Sac Region 511 website offers live traffic information from our local jurisdictions and Caltrans integrated into a Google trip planner. There is also general information for other modes of transportation on the Sac Region 511 website.

**4. Discussion/Analysis:**

The Transportation Committee supports the staff recommendation, but directed staff to not feel compelled to select a vendor if there is not one that will provide a very unique and exceptional service.

The Sac Region 511 and Commuter Club websites offer similar but different services to the public. One features an Intelligent Transportation System (ITS) traffic map that shows a live data feed of incidents sourced from multiple agencies' traffic and information technology departments, as well as general travel information. The other website is a database of users interested in carpooling or using services provided by SACOG's Transportation Demand Management program and its TMO partners. The current

Commuter Club vendor's contract will expire in October 2018. The Sac Region 511 website is a free WordPress site that has our 511 ITS map embedded into it.

When contracts expire, SACOG's policy is to open up contracts through a competitive RFP process. Attachment A is a draft scope of work for the RFP that includes the current Commuter Club functions plus the added features that are found on SacRegion511.org. The goal with this RFP process is to take the opportunity to combine these two separate websites into a one-stop location for people to plan their trips, earn incentives for non-drive alone modes of travel, find ride matches, and participate in campaigns like May is Bike Month. SACOG staff will be looking for a vendor that has an affordable solution to combining these sites. The vendor that provides the ITS map and manages active communications with local agencies will remain the same, but the traffic and incident data compiled by this vendor could be shared with the selected vendors to create a one-stop trip planning and ridematching tool for public use. While the hope is that we can provide a one-stop location for trip planning and encouragement of non-drive alone modes of travel, staff does not recommend developing something unique and proprietary. We will be looking to partner with the private sector on something that is already being developed. In the coming years we are likely to see Google, WAZE, Moovel, Uber or some other entity come out with a Mobility as a Service platform that allows users to select from a variety of transportation options and pay for those services all from the same application/account. This RFP is to bridge a gap in service between what exists now and what will exist in the future. Currently, there is no vendor offering a free platform for trip planning that includes ride-matching and incentives for using non-drive alone modes. The RFP will be for a one-year contract not to exceed \$100,000, with an option to extend the contract for an additional three years. Staff will work with members of the TDM Task Force to form a proposal review panel of active administrative users of the website.

## **5. Fiscal Impact/Grant Information:**

This item has no fiscal impact to the agency's operating budget, other than what is budgeted. This contract would not exceed \$100,000 annually, which is within the TDM Program budget and is \$15,000 less annually than previous years.

### **ATTACHMENTS:**

Description

Attachment A - Commuter Club / 511 Website RFP Scope of Work

### **This staff report aligns with the following SACOG Work Plan Goals:**

#5 - Establish the Sacramento Region as an Innovator & Test-Bed for New Ideas

#6 - Help the Region Advance a Vision for "Next Generation Transit"

# SACOG TDM Web Tool RFP

## Program Description:

The Sacramento Area Council of Governments (SACOG) is requesting proposals for a comprehensive and user-friendly ride matching and trip planning web-based software for use in its regional Transportation Demand Management (TDM) programs and brands – [Sac Region Commuter Club](#) (Commuter Club) and [Sac Region 511](#) (511).

SACOG invites the submission of proposals by qualified consultants to provide a one-stop website (combining Commuter Club and 511 websites into one seamless look and feel for the end user). This one-stop website should offer multimodal trip planning, ride matching, contact management, emergency ride home program administration and complementary software services to facilitate and incentivize mode shift towards non-drive alone modes of transportation (e.g., carpooling, vanpooling, biking, walking, transit, and/or teleworking) in the six-county Sacramento region. It should allow users to plan a trip and offer all possible mode options in one platform including ride share, car share, bike share, transit, bike, walk, ride hailing, scooter share, and any other modes of transportation available in the region. The consultant should also propose how it would incorporate the traffic data from the 511 map into an all-inclusive trip planning tool, whether that means adding the data as layers to a map or creating a single sign on for the existing 511 and Commuter Club databases.

Where possible, the consultant is encouraged to propose innovative solutions or features not included in the scope of work. Suggestions that could cost-effectively expand the functionalities of the Commuter Club or 511 websites, enhance program activities, or provide a turnkey solution will be reviewed with interest. The data collected for the Sac Region 511 traffic map will continue to be collected by the existing vendor. This scope of work is only for how this data and information can be displayed public in a user-friendly way.

The consultant shall furnish transportation demand management software services including but not limited to:

1. Design and development of a transportation demand management software platform that supports and combines the existing Commuter Club and 511 websites
2. Software hosting services and maintenance
3. Staff orientation and training

## Current environment:

The Commuter Club and 511 programs serve the residents and employers of the six-county SACOG region, which includes El Dorado, Placer, Sacramento, Sutter, Yolo, and Yuba counties. The program currently has approximately 33,000 commuters registered for ridematching and/or transportation information in its existing Commuter Club database system, which is managed by a third party web developer. The Commuter Club website ([www.sacregioncommuterclub.org](http://www.sacregioncommuterclub.org)) currently serves as the primary tool to promote alternative transportation options and support services. Commuter Club provides information on carpooling, vanpooling, transit, and incentives. The Commuter Club database

is also linked with two campaign websites: [www.mayisbikemonth.com](http://www.mayisbikemonth.com) and [www.readysetridechallenge.com](http://www.readysetridechallenge.com).

The [www.SacRegion511.org](http://www.SacRegion511.org) website features an Intelligent Transportation System (ITS) traffic map that shows a live data feed of incidents sourced from multiple local agencies' traffic and information technology departments to inform the public about current road conditions. The ITS data and communications features used by local agencies is provided by a third party vendor. This vendor would continue to manage the data collection and communication functions related to ITS work. In addition to the live traffic map, the public-facing 511 website provides information about park and ride lots, vanpool subsidy program, and other travel information. The 511 website is supported by SACOG staff using WordPress, with the exception of the traffic map, which is embedded into the website. The consultant for this RFP shall propose collapsing Commuter Club database features and the 511 public information websites into a one-stop location for trip planning and incentivizing non-drive alone modes of transportation. The consultant may also propose collapsing all four existing sites into one comprehensive tool.

## **Scope of Work:**

The web-based multimodal trip planning and ridematching service will offer users the ability to both find the best travel mode and route for their trip as well as actively search for other people who have similar transportation needs along a similar route. Consultants also need to include a trip tracking report and incentive program.

The program will guard user confidentiality, produce maps and directions, email contact information and pre-draft email correspondence that a user may personalize. The hosting service will include any service upgrades made during the contract period, and the contractor must provide ongoing database maintenance, updates of the maps and reporting functions as required by SACOG.

SACOG will administer the consultant contract and be the primary contact. It is proposed that the term of the initial contract is for two years, beginning September 1, 2018 and ending September 1, 2020, with the option to extend the contract for up to two years.

### **Design and Development of web tool:**

#### **Kick off meeting**

SACOG will arrange a kick-off meeting with the consultant to identify data collection and reporting needs.

#### **Branding & integration**

SACOG will work with the consultant to ensure the platform is branded appropriately and is integrated with Transportation Management Association/Organization (TMA/O), College/University, employer, or otherwise appropriate branding.

#### **Interface & Integration**

Provide a platform that is responsive and user-friendly on all devices, and integrates with social media and popular ridesharing and transportation-related mobile apps. Platform tools should be accessible

using the most popular current browsers. Consultant should migrate the existing contact database and relevant information to the new platform.

### Tool Requirements

Work with SACOG and key stakeholders to customize the trip matching tool interface to include locally relevant and available information. The tool needs to be developed to function on a region-wide basis and across a network of multiple employers. The tool should be available as a website with mobile functionality (iOS and Android). SACOG has provided a summary list of required and desired critical functions at the end of this scope of work.

## Critical Functions of the tool

### System administration

SACOG Administrators require the following features:

- Ability to have three levels of administration: Regional Super Admin level that can see all user and database information, Transportation Management Organization level that can see user and database information for a city or specific set of zip codes, and Employee Transportation Coordinator level that can view user information at the employer level.
- Ability to run reports for specific geographies of different administrator levels.
- Ability to email, plan trips, administer subsidy programs, and edit program specific pages at the various admin levels.
- Ability to create, remove, review, and edit accounts.
- Ability to archive old accounts.
- Ability to block or restrict access to certain questionable accounts.
- Ability to add comments to accounts.
- Ability to create and manage accounts without having member emails, where members will be assigned an individual and unique member name (screen name) and password that is assigned to them or that they requested.
- Ability to identify and remove redundant accounts.
- Comprehensive reporting and dashboards.
- Website analytics including, but not limited to, behavior, unique visitors, page views, and point of entry.
- Ability to categorize users by status and mode.
- System must display Terms of Use and Privacy Policies on landing/main page.
- Administrator must have ability to set or reset passwords on behalf of individual users.

## Multi-modal Route Planning

Registration Requirements	<ul style="list-style-type: none"> <li>• Non-registered users must have the ability to use the trip planner; however, non-registered users must be required to register for an account before being able to confirm a ridematch or obtain details about forming carpools, vanpools or applying for incentive programs.</li> <li>• Registered users will have the capability of selecting and forming a ridematch using the system.</li> <li>• Unregistered users who have interest in forming a ridematch shall first be directed to the ridematching registration page. Upon completing the registration, these users will be able to continue where they left off and complete the ridematching process.</li> </ul>
Personalization	<ul style="list-style-type: none"> <li>• Users shall have the ability to personalize the system by creating and saving favorite trips and alerts for transit route changes and other relevant information</li> </ul>
Trip Planning Analytics	<ul style="list-style-type: none"> <li>• The system shall provide administrators with the ability to assess the effectiveness of the programs and incentives, access information about the travel habits of users, map the location of commuters and employers, mode information to include locations, time etc.</li> </ul>
Trip Logging	<ul style="list-style-type: none"> <li>• Users must be able to log recurring and one-time trips.</li> <li>• Users shall have the ability to create a trip that utilizes multiple modes. For instance, a travel sequence involving walking to a transit station and then taking a bus to work should be considered a single commute trip capturing both modes.</li> <li>• Users must have the ability to create and save multiple trips.</li> <li>• Consultant/vendor should provide solutions on how users could log a multi-purpose trip, such as a trip involving a parent making a stop at a school to drop his/her children before heading to work.</li> <li>• Logging trips by mode daily would also be an important function as it relates to campaigns, contests and promotions.</li> <li>• A passive trip logging platform is preferred.</li> </ul>
Trip Search Capability	<ul style="list-style-type: none"> <li>• Registered users and non-registered users shall be able to search for available travel alternatives between two locations based on a given set of preferences.</li> <li>• Users shall be able to specify whether they are planning an immediate trip or a trip to start at some point into the future.</li> <li>• Users shall be able to enter the start and end points of a trip by selecting locations on a regional map interface or entering specific street addresses, popular destinations, city, or community. The search bar should auto-populate.</li> <li>• For immediate trips, the system shall have the capability to consider real-time departure information from transit agencies where such information is available.</li> <li>• For transit searches, the system shall consider local and regional bus transit systems within the six-county region, as well as service provided by Amtrak. Connection options with major transit services in the Bay Area and San Joaquin regions are also strongly desired.</li> <li>• Offer the ability to limit searches to network, such as employer network.</li> <li>• Users shall be able to modify parameters (miles, times, start/mid/end point) and set contact preference to email or phone and select confidentiality parameters.</li> </ul>

	<ul style="list-style-type: none"> <li>• Offer ability to opt-out of the commuter matching portion of the system yet still use other functions such as reporting trips or plan routes.</li> <li>• The trip planner shall search the database for available ridematches and present the relevant carpool and vanpool mode options with the trip plan results.</li> </ul>
Displaying of Trip Search Results	<ul style="list-style-type: none"> <li>• When providing trip results, the trip planner shall provide users with a trip plan comparing available modal trip options using criteria such as travel time, total trip cost, environmental factors such as carbon dioxide (CO<sub>2</sub>) footprint, and health benefits measures such as calories burned.</li> <li>• Results should also include a display of park and ride lots that are available within a certain radius of the origin and destination points.</li> <li>• Trip search results should be easy to read and provide maps with the ability to print in different formats.</li> </ul>
Comparison of Transportation Modes	<ul style="list-style-type: none"> <li>• The system shall provide, with every trip search, the ability to view trip details or statistics for similar travel made by 1) driving alone 2) taking public transit 3) carpooling 4) vanpooling 5) biking 6) walking 6) walking to transit</li> </ul>

### Accounts

Key system features regarding account management include:

- Users must be able to create a unique member name and password.
- The system shall provide the ability for users to link their account information to social media applications, as well as allow users to register and sign-in to the system using social media accounts including, but not limited to, Facebook, Google+, or Twitter.
- Users should be able to update when needed their profile information, contact information and other relevant personal information that may be used by the system.
- Users must have ability to securely retrieve passwords or login if forgotten.
- From their account, registered users must further have the ability to search for and contact potential ridematches, log trips, and participate in campaigns and events. Users shall also have the ability to contact a system administrator if needed.

### Ridematching & Trip Planning

Key system features regarding ridematching and trip planning functionalities include:

- The system shall enable users to search the database for available ridematches to share all or part of their commute trip(s).
- The system shall enable users to search for both future and immediate on-demand trips. Supported modes should include, but not be limited to, carpool, vanpool, transit, bike, and walk.
- In addition to searching the SACOG database, vendors are encouraged to expand the ridematch search to include the user's social graph including, but not limited to, Facebook, Google+, and other popular social networks.

- Administrator must have the ability to code user by type, such as vanpooler, carpooler, etc.
- The system must have the ability to set up automated notifications/alerts. For example, as users are added to the ridematching database, existing commuters are automatically notified when a new user who meets their criteria was added to the system.
- The user must be able to limit searches to networks, such as an employer network.
- The user should be able to search for options "on the way" to their destination

#### Supplementation Information (vanpools, park and rides, school pool, bike share, etc)

The system shall provide support for SACOG administrators to manage vanpool details, including registration and subsidies. It must be able to include pick-up locations and necessary stops. On the user side, the ability to search for available vanpools shall be provided as part of the general ridematching/trip planning search functions.

The system shall display interactive data on park and ride lots, bike share stations, electric vehicle charging stations, traffic/road conditions, and any other available data. The displayed data shall include, but not be limited to: address, number of available parking spaces/bikes. Park and ride lot information shall also be included in the trip planning results.

#### Contact Management

The system shall include a contact management system to maintain employer and community network information. This system would serve as the primary lead generation, follow-up, and support system tool for program outreach. Features should include, but not be limited to the following:

- Ability to create unlimited amount of records and multiple contacts within each record
- Ability to accommodate up to at least 10 registered administrators
- Email integration
- Ability to import/export data easily
- Customer interaction with social networks, including but not limited to, LinkedIn, Facebook, Instagram, Google+
- File sharing within the SACOG team
- Document management to allow files and other documents to be linked to a specific record
- Activity scheduling and tracking
- Email marketing
- Pre-defined and customizable fields
- Pre-defined and custom reports and dashboards

- Lead generation and follow-up
- Cluster mapping of employer site locations

### Emergency Ride Home (ERH)

SACOG and Transportation Management Organization (TMO) administrators shall be able to manage ERH user accounts including, but not limited to, user eligibility and account management of the ERH program. Users that work at employer sites that are members of TMOs will be eligible to use ERH services, with voucher limits set by individual TMOs. Users must also be utilizing specific commute modes (e.g., carpooling, transit, or bicycle) and traveling by said commute mode at least three times per week. The system shall further provide users with a method to request a travel voucher (required in advance to use the ERH in an area where a TMO is contracted with a taxi, transportation network company, or rental car company), to track usage and limits, and to potentially submit a reimbursement request. The system should finally provide the ability for users to submit a post-ride survey upon completion of an ERH trip.

### Campaigns

The SACOG administrator must have the ability to setup campaigns, such as May is Bike Month or the Ready Set Ride Commute Challenge. This includes, without being limited to: setting campaign criteria and goals; promoting the campaign to any or all users; providing users with the ability to enroll in the campaign; providing users the ability to track and accumulate trips toward a campaign or individual goal; and providing campaign administrators with the ability to track progress metrics for the campaign. Both participants and administrators would have ability to view activity/results in dashboard like format.

### Events

SACOG administrators shall have the ability to create, edit, and delete events. Events are to include, without being limited to, such activities as concerts, sporting events and street fairs. For major events, the system shall further provide system users with an opportunity to search for and create ridesharing for shared rides to or from the events. SACOG would also allow user event submissions with prior SACOG administrator approval.

### Incentives, contests, promotions, and subsidies

SACOG administrators must have the ability to post and manage incentives, contests and promotions. This feature shall have the following:

- Easy for administrators to set up, manage, and fulfill subsidies and prizes.
- Easy for members to engage, check progress, and claim.
- Option to show results to all registered users, through social media links or to restrict visibility to a single or subset of users.
- Ability to setup custom criteria for incentives based on multiple factors including, but not limited to, number of trips, number of miles traveled, and timeframe.
- Multiple prize drawing choices.

- Ability to draw multiple winners at once.
- Recipient reports (per campaign).
- Ability for administrator to track and record status of claims.
- Ability to implement a rewards system and, if possible, to link to social networking sites.
- Ability to provide a leaderboard feature to display status of participation to drive engagement.

### Communication with users

The system must include an integrated email feature to provide SACOG administrators with the following capabilities:

- Ability to choose font type, add logos, attachments and/or other designs.
- Ability to create custom groups for email campaigns.
- Email an individual member directly from their account.
- Email all members directly through the system.
- Automatic email notification set-up.
- Tracking of email analytics (e.g., delivered, bounce back, open rate).
- Ability to create and post newsletters to all users or filter based on type, location or other defined fields.
- Ability to create, send and develop results for surveys
- Integration with email provider like Mailchimp is also desired

### Reporting Requirements

The system must be able to generate pre-defined and custom reports summarizing the various travel time and environmental benefits achieved by individuals and community. This includes the ability to post relevant summary information on computer screen dashboards.

The reporting features must enable system users to generate reports detailing and summarizing their travel activities.

System administrators must further be able to generate program-specific reports that include metrics such as mode shift, vehicle miles traveled resulting from those mode shifts, number of new carpools, number of new vanpools, other pooling and alternative travel activities, and reports summarizing activities from groups of system users. For administrative purposes, an ability to save reports in various formats such as pdf, jpeg, is also required. Reports should be visually appealing.

### User Experience

The end-users of the system should have a seamless experience that displays all of the following features:

Home page:

- Trip planning (see Features section)
- Log-in/credentials

Account page:

- Individual, network, and overall achievements
- Cost and greenhouse gas savings for specific periods, e.g., last week, last month, this year, last year, since registered
- The employer network the user is attached to (if applicable)
- Programs for which the end user is enrolled, such as vanpool, ERH, etc.
- The programs the end user is eligible for, such as ERH, but is not yet enrolled
- Updates that have occurred since last log in
- Messages from SACOG and network administrators, e.g., upcoming campaigns, events, or incentives

### Navigation

The system shall be easy to navigate with features such as a “back” button and location breadcrumbs that will keep users on the site without timing them out of the system.

### Data Management

The selected Contractor will be responsible to transfer existing rideshare system data. This includes, but is not limited to, migrating accounts and campaigns from the current Commuter Club database to the new database hosted by the vendor. Prior to completing the transfer, the selected Contractor shall scrub the data; remove duplicate, outdated, and irrelevant records; and shall provide SACOG staff with a final version of the database for review prior to completing the transfer process.

### Customization

During the life of the contract, updates and enhancements will likely be required. The selected Contractor shall work in a collaborative and cooperative manner to provide ongoing support and maintenance services to accommodate such updates and enhancements.

Individual Task Orders may be issued to address specific system enhancements.

### Maintenance and operations (hosting and maintenance)

Once the system is deployed, Contractor will perform periodic maintenance of the system. This includes, but is not limited to, bug fixes and platform upgrades. Operations of the system includes, but is not limited to, hosting the system in a location with a high availability rate (above 95%) and responding to SACOG inquiries. All data collected under this contract shall be the property of SACOG and shall be provided in accessible and useable format upon request of SACOG or in the event of the termination of this contract.

### System compatibility

The systems currently utilized are supported by Windows 7 and Outlook 2010 and above.

### Orientation and training

- Hold and record training for SACOG staff
- Provide training opportunities when platform features are introduced or updated

## Required project deliverables

The selected Contractor shall develop a project management plan that describes the Project management methodology, the milestone deliverables and the delivery schedule. At a minimum, the Contractor shall include the following deliverables:

1. Project Plan and Schedule
2. Meetings with Staff and Monthly Progress Reports
3. Design and Development of TDM System
4. Employee Training
5. Development of Operations Manual
6. Committee and Board draft and final reports/presentation
7. Testing of the product
8. Implementation of the Product
9. Maintenance Plan

## SACOG will provide the selected Consultant with:

### Available local data/information including:

- Transit stops, stations and service
- Electric vehicle parking
- Bike parking
- Park and ride lots
- Schools and universities
- Event parking
- Bike share stations

### Program information

### Custom logos and graphics

### Timely review of submittals

Features		Priority	
		Required	Desired
<b>Geographic coverage</b>	Sacramento 6-County Region	X	
	San Francisco Bay Area	X	
	San Joaquin Region	X	
	Other bordering areas		X
	Regional bus transit (a)	X	
	Local bus transit (b)	X	
	Capitol Corridor (Amtrak)	X	
	Bay Area and SJCOG area Transit		X
<b>Modes (routing/scheduling and map overlay options)</b>	Carpools	X	
	Vanpools	X	
	Park/Ride Lots	X	
	Walking routes	X	
	Walk to transit	X	
	Bike share	X	
	Bike routes	X	
	Transportation Network Companies (when carpooling services are available)	X	
	Car share companies (currently Zipcar)		X
	Electric Vehicle Charging Stations		X
	Waze carpool		X
	Travel Time	X	
<b>Modal comparison for individual trip</b>	Travel cost	X	
	Health benefits	X	
	Environmental Cost	X	
	Traditional computer	X	
<b>User interface</b>	Mobile device	X	
	Social Media	X	
	Employer Portal	X	

	Downloads to third-party apps	X	
<b>Data access/feeds</b>	Uploads from transit operators	X	
	Emergency Ride Home	X	
<b>Supplementary information</b>	Tax benefits		X
	Incentives & subsidies by area		X
	Active Tracking	X	
<b>Trip Tracking</b>	Passive Tracking		X
	User-defined page with favorite trips		X
<b>Personalization and trip alerts</b>	Real-time transit departure times		X
	Immediate trip planning (d)	X	
	Future trip planning (d)	X	
	Alerts during vehicle trip		X
	Alerts during transit trip		X
	Updates to favorite trips		X
	Unlimited contacts	X	
	Up to 10 users	X	
	Data import/export	X	
	Email integration	X	
	Survey integration	X	
	Customer interactions with social media	X	
	File sharing within SACOG	X	
<b>Contact Management</b>	Document management (docs saved to records)		X
	Email marketing	X	
	Lead generation & follow-up	X	
	Custom data fields	X	
	Pre-defined & custom reporting	X	
	Integration with ridematching system	X	
	Activity scheduling and tracking	X	