



May 14, 2020

To: Transit Committee

From: Darrell E. Johnson, Chief Executive Officer

Subject: Sole Source Agreements for the Purchase of Trapeze Software Group, Inc., Software Modules

A handwritten signature in blue ink, appearing to read "Darrell Johnson", is written over the "From:" line of the header.

Overview

The Orange County Transportation Authority utilizes software from Trapeze Software Group, Inc., to schedule trip requests for the OC ACCESS paratransit service. Staff is recommending the purchase of three additional software modules from Trapeze Software Group, Inc., to enhance customer service, system monitoring, and operational efficiency.

Recommendations

- A. Authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C-0-2125 between the Orange County Transportation Authority and Trapeze Software Group, Inc., in the amount of \$104,356, for the sole source purchase and installation of the Trapeze DriverMate software module.
- B. Authorize the Chief Executive Officer to negotiate and execute sole source Agreement No. C-0-2126 between the Orange County Transportation Authority and Trapeze Software Group, Inc., in the amount of \$93,388, for the sole source purchase and installation of the Trapeze Eligibility Management and the Trapeze Service Infractions software modules.

Discussion

Trapeze Software Group, Inc. (Trapeze) has provided proprietary trip scheduling, routing and dispatching, and eligibility management software modules to approximately 600 transit agencies in North America. In the Southern California region, these agencies include Long Beach Transit, Los Angeles Access Services, Omnitrans, Orange County Transportation Authority (OCTA),

Riverside Transit Agency, San Diego Metropolitan Transit System, and the City of Santa Monica Big Blue Bus.

OCTA currently utilizes Trapeze software products for the operation and management of the OC ACCESS paratransit service. Trapeze software modules are used to schedule trips, administer the OC ACCESS eligibility process, operate the Interactive Voice Response system, and generate operating, trip, and financial reporting data for the OC ACCESS service. To improve the administration and operation of the OC ACCESS service, staff is requesting approval to add three software modules to the current Trapeze platform.

Trapeze DriverMate

OCTA provides approximately 1.5 million passenger trips annually on the OC ACCESS paratransit service. The OCTA-owned vehicles operated through an agreement with MV Transportation, Inc (MV) are equipped with mobile data terminals (MDT) that provide communication between the MV dispatcher and the operators. Some of the vehicles used by MV's subcontractor are equipped with an older MDT system that is obsolete, and some rely strictly on voice communication to relay information between the dispatcher and the operator. With the implementation of Trapeze DriverMate, smartphones, tablets, or other handheld devices may be used in lieu of MDT equipment to connect a subcontracted vehicle with the MV dispatch center and OCTA administration. Contact between dispatchers and operators is vital to maintain a smooth-running operation. Dispatchers need immediate notification of a no-show or late cancellation in order to manage a schedule in real time. Operators will benefit from less radio chatter and will be able to receive more information about traffic conditions and efficiently report no-shows and cancellations, as well as update pertinent passenger booking information such as the type of mobility aid a customer may be using. The implementation of this module has the potential to improve on-time performance, enhance the customer's overall trip experience and incorporate new subcontractors to provide OC ACCESS service.

Trapeze Eligibility Management

The Americans with Disabilities Act of 1990 (ADA) defines specific guidelines and processes that must be followed when addressing ADA customer eligibility. The Trapeze Eligibility Management software is designed to manage paratransit eligibility by integrating the existing databases and modules currently in use including, but not limited to, the client portal module, scheduling, routing, and dispatching operations modules.

This module will automate some tasks currently performed as associated with the eligibility process by:

- Managing communication with the customer via letters and emails;
- Allowing customers to pre-register, self-register, and auto-renew eligibility;
- Preventing incomplete applications from being submitted; and
- Incorporating statistical analyses into the standard Trapeze reporting packages.

Trapeze Service Infractions

The Trapeze Service Infractions software product upgrades a module currently in use that is no longer supported by Trapeze, ensuring OCTA maintains compliance with Federal Transit Administration (FTA) and ADA guidelines pertaining to no-show and late cancellation trip policies. The module will allow staff to evaluate customer trip histories based on agency-defined no-show and late cancellation trip policies; and identify, track, and record policy violations. In addition, the module will centralize all investigations; uniformly implement agency no-show and late cancellation trip policies thereby reducing errors in response and appeals; automate warning and suspension letters for customers; and easily adapt and update to industry, agency, and FTA or ADA changes.

Procurement Approach

This procurement was handled in accordance with OCTA Board of Directors (Board)-approved policies and procedures for a sole source procurement.

Trapeze is the exclusive owner of all proprietary rights and the sole entity able to market and sell the software for Trapeze DriverMate, Trapeze Eligibility Management, and Trapeze Service Infractions software modules. Trapeze is the sole contractor who can provide the application program interface and perform the installation services required to ensure successful completion of this project. Therefore, the agreement with Trapeze meets OCTA's criteria for a sole source procurement. Based on their technical ability and financial status, Trapeze is deemed responsible.

Trapeze's proposal was reviewed by staff from the Contracts Administration and Materials Management (CAMM) and the Paratransit Services departments to ensure compliance with the contract terms and conditions, as well as the technical requirements.

In accordance with OCTA's sole source procurement procedures, a sole source over \$50,000 requires OCTA's Internal Audit Department (Internal Audit) to conduct an independent pre-award, agreed-upon procedures review of Trapeze's proposed pricing. Internal Audit's findings were considered and used as a basis for negotiations with Trapeze. Additionally, CAMM conducted market research to determine reasonableness in pricing.

CAMM confirmed Trapeze has contracts with other clients that are public transportation agencies with the same labor rates as quoted to OCTA. Furthermore, Trapeze's quoted total pricing is about six percent lower than the project manager's estimate and the level of effort was approved by the project manager. Therefore, pricing is deemed fair and reasonable.

Fiscal Impact

Funds for this project are available in the OCTA Fiscal Year 2019-20 Budget, Operations Division, Paratransit Services Department, accounts 2147-9028-D4102-11M, 2147-7519-D4302-0PX, and 2147-9028-D4302-0PV.

Summary

Based on the information provided, staff recommends the Board authorize the Chief Executive Officer to negotiate and execute Agreement Nos. C-0-2125 and C-0-2126 between the OCTA and Trapeze, in the total amount of \$197,744, for the purchase and installation of the Trapeze DriverMate, Trapeze Eligibility Management, and Trapeze Service Infractions software modules.

Attachment

None.

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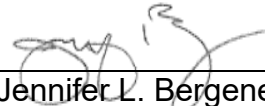
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