Valley Transit
CONNECTING THE FOX CITIES

Memorandum

TO: Fox Cities Transit Commission

FROM: Ron McDonald, General Manager

DATE: September 19, 2022

RE: Award Recommendation for Scheduling & Planning Software

BACKGROUND

Valley Transit currently utilizes several manual processes and relies on third-party support to complete tasks related to operations and route planning. This includes driver scheduling, run cutting, rostering, route alternatives analysis, payroll data matching and maintenance of service data utilized by other software applications, like Google Transit. There is a need to automate and expand these functions to maintain existing operations more efficiently, adapt to changes in service, and analyze alternatives in service/labor.

There are specialized applications available in the market that supply scheduling and planning software, which manage some or all of these tasks. The software features include: driver scheduling optimization; budget scenario outputs; route planning tools; analysis of community demographics, including Title VI aspects; employee timecard matching tools; payroll system interface; GTFS data management (data required by Google Transit for trip planning); and service data management (routes, bus stop locations, timetables and other service attributes).

A significant component of this software relates to the automation of driver scheduling. Valley Transit's operations staff utilize a manual process to maintain seasonal driver schedules and manage daily changes. Without automation, there is a considerable and time-consuming effort to create a new schedule. The current process makes it difficult to quickly pivot for service changes or review alternatives. Scheduling and planning software would automate this entire process from schedule creation through completion of daily work assignments by employees. It would create multiple schedule scenarios and ensure all scenarios adhere to requirements of our customers, budget and collective bargaining agreement based on customized variables entered by Valley Transit in the software. The software would create a more efficient process for daily scheduling, improve alternatives analysis, provide more scheduling options throughout the year and create a readiness to react to any future service changes driven by labor or community needs. Other software features, like the route planning and GTFS management tools, would have the same benefits for Valley Transit in terms of automating manual or inefficient processes and improving organizational capabilities.

Valley Transit's emergency preparedness planning requires review of all tasks and resources related to daily operations, including how to maintain normal service at other locations. Under a scenario where the Whitman Facility is inaccessible and operations is required to move, our current scheduling, timekeeping and work assignment processes could not be quickly replicated at another location. A cloud-based scheduling software system will enable many core tasks related to scheduling, active assignment adjustments and time-keeping to function normally, even at a temporary operations location.

In preparation for this procurement, Valley Transit staff developed a request for proposal (RFP) document to solicit proposals from vendors. As part of this process, staff reviewed RFP documents that were used by other entities to purchase similar software. City of Appleton IT and East Central WI Region Planning Commission staff also reviewed the project in the planning stages and provided feedback.

The RFP document was sent directly to vendors who were known suppliers; posted on the State of Wisconsin's Vendornet system; and advertised in print and online with the *Post-Crescent, Green Bay Press Gazette and the Oshkosh Northwestern*. Proposals were due on August 10, 2022. Two proposals were received prior to the required deadline: Clever Devices Ltd. (Woodbury, NY) and Optibus, Inc. (New York, NY).

ANALYSIS

Each proposal was evaluated based on the vendor's compliance with the scope of work, experience, qualifications, training, support & price. Optibus Inc. provided the only proposal able to comply with all major functional requirements (scheduling, route planning & GFTS management) and was subsequently moved forward in the evaluation process. Optibus was then invited to provide a product demonstration on August 29, 2022. After consideration of the written proposal and product demo, the evaluation team unanimously concluded Optibus had proposed the best solution for Valley Transit.

Optibus's written proposal clearly described the system capabilities in relation to the scope of work, implementation process, system support and training process. System features include: a Scheduling & Rostering Module (vehicle scheduling, driver scheduling, relief vehicle scheduling, active roster control based on availability, payroll matching); a GTFS Manager Module (manages all geographic data related to service, including bus stop locations, route lines, timepoints, fares and route schedules); and a Planning Module (timetable planning, sandbox for route planning, scenario cost estimation, geospatial tools, Census data layers for demographic analysis and Title VI impact analysis).

Optibus was the only vendor with a planning module, which graphically displays route design alternatives and overlays various types of Census data. Optibus's product is cloud-based and compliant with the data security requirements specified by the City of Appleton's IT staff. Optibus has existing experience at other transit clients successfully integrating data from their system to other software. Data integration is very important to Valley Transit's ongoing requirement for open data and automated flow of data between various third-party products. All Optibus client references returned responses with high marks.

Optibus proposed a 12-week training schedule for staff. Depending on contract execution, the goal of full product roll-out in the first quarter of 2023.

FISCAL IMPACT

In contract years 2022-2024, Optibus Inc.'s annual SaaS (software as a service) fee for all modules is $42,406. In contract years 2025 & 2026, Optibus Inc.'s annual SaaS fee is $46,646. The annual fee covers access to the software, configuration, set-up, training, ongoing training, integrations and support.

Existing federal grants would cover 80% of total project cost. The remaining cost would be expensed from Valley Transit's annual budget.

RECOMMENDATION

Staff recommends authorization for Valley Transit to enter into contracts with Optibus, Inc. to provide scheduling and planning software.