September 8, 2021

**AGENDA
ITEM #4**

MEMORANDUM

To: Pomona Valley Transportation Authority

From: Nicole Carranza, Senior Program Manager

Subject: Ecolane Scheduling Software Mobile Application for Passengers

Recommended Action: *Approve amending PVTA's agreement with First Transit to include the acquisition and provision to PVTA of the Ecolane Mobile Application.*

Summary
An emphasis of the PVTA Service Design Analysis (SDA) was simplifying the riders' experience. In July 2020, PVTA initiated a new service agreement which included the implementation of a scheduling software with the option of a mobile applications feature for riders. The scheduling software is being implemented in a phased approach. PVTA is currently working on Phase 3 of the implementation, the introduction of a mobile app.

→ **Phase 1. Ecolane DRT** - The main platform has been installed and is being used in operations. Call takers process reservation requests over the phone and trips can be scheduled in an automated fashion with the oversight of dispatchers. Drivers' schedules and reporting have been moved to a paperless digital platform.

→ **Phase 2. Ecolane and 5M Software Integration** - The integration of the taxi subcontractor software 5M is complete. Live taxi data and reporting is shared and stored in the Ecolane software system. This allows for the dedicated contractor First Transit to send overflow trips directly to the 5M scheduling software. First Transit now has the capability to oversee any trips sent and performed in a live environment, reducing errors in the sharing of trips, and creating accountability.

→ **Phase 3. Ecolane Mobile App Integration and Beta Testing** -The next phase in the software implementation is the introduction of a mobile app. The application will be beta tested and implemented in a phased approach to reduce service disruption. PVTA will first introduce the application to a limited number of riders to test the application's accuracy and fine tune its operation before introducing on a system wide basis.

Mobile App Functionality
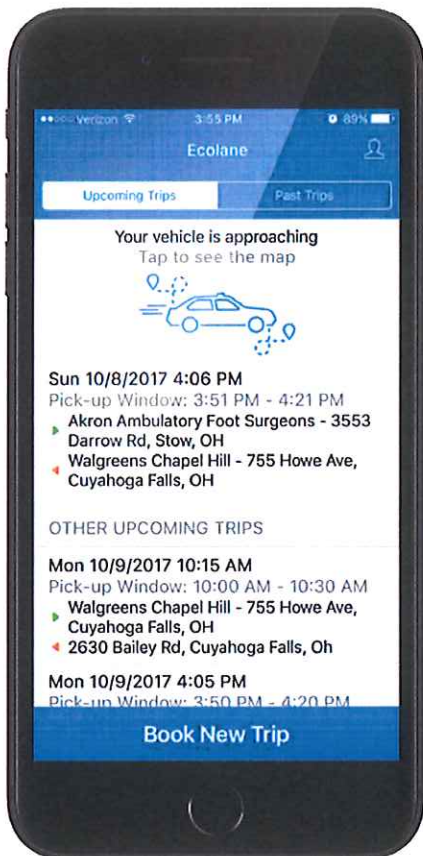
- Flexibility for Riders to Manage Trips

Riders will have direct access to review and manage their transportation needs including, scheduling, cancelling, and monitoring their trip ETA and view both upcoming and completed trips.

- Convenient Trip Details View

Built-in phone notifications alert riders with vehicle ETA's reducing wait time on the phones. When a vehicle is on its way, riders are able to track the journey using a visual map.

- Simplified Mobile Interface

Riders have access to account profiles, reservation, and travel history.

- WCAG 2.0 Compatibility

Web Content Accessibility Guidelines define how to make Web content more accessible to people with disabilities. The mobile app is accessible for people with disabilities and follows the recommendations in the WCAG.

- Fare Payment Options

The Mobile App provides the riders fare payment options. Riders will have the option to pay via the app with a credit card or to keep stored value to be used later. Family members or caretakers can also add stored value to the rider's account. All data communication between the Ecolane DRT server and the Self-Service mobile application or website is secure and encrypted.

Selection of the Ecolane Application

The service proposal from First Transit included supplying the Ecolane software platform to PVTA. The proposal also included the option for PVTA to add the mobile application at a later date. Now that the integration of the Ecolane platform throughout our services is complete we can move forward with the launch of the mobile application. The selection of the Ecolane application has the advantage of already being fully integrated with our existing software platform. It will not be necessary to go through the time and expense of integrating another software product to our existing platform.

We contacted several users of the Ecolane mobile application. It is being used successfully by several transit agencies in California including the San Joaquin Rapid Transit District's VanGo service. PVTA's anticipated use of the App is somewhat more extensive than in other areas, deploying the App over multiple services.

Contract Modification and Cost

The first year cost to acquire and deploy the mobile application will be $89,690. The annual cost in years two through five will be $11,998. The cost of deploying the application was included in the FY 2022 budget adopted in June. A more detailed work scope and the price quotation are attached to this report.

Mobile App Implementation Timeline

The Ecolane app is generally a plug and play process, however, to meet PVTA's requirements some customization well be needed. It is our plan to beta test the application before making it available to the entire system. Our tentative timeline for implementation is shown below:

- **September 2021**– Finalize the contract amendment for the acquisition of the App.

- **October-December 2021-** Begin the app customization process.

- **January-April 2022-** Controlled group beta testing of the application with passengers that use multiple PVTA services.

- **May-June 2022–** Final review of beta app testing outcomes, data, and customer experience.

- **July 2022** – Go live for all PVTA services

Future Technological Enhancements- GTFS - FLEX

General Transit Feed Specification (GTFS) is data that is currently available for fixed route transit systems such as Metro and Foothill Transit. The benefits of GTFS data that is compiled from a scheduling software is that it helps streamline and link transportation systems together in one platform such as Google Transit Applications. GTFS is currently in the process of being made available for demand response systems such as PVTA with GTFS-FLEX. Once GTFS-FLEX becomes available, we plan to add PVTA service information to the system.

Ecolane ⫘

Price Quote

Ecolane | 940 W Valley Rd, Suite 1400 | Wayne, PA 19087

844-ECO-LANE | 610-312-0033 | SALES@ECOLANE.COM

DATE	TRANSIT AGENCY NAME	ADDRESS	CITY, STATE ZIP
5/28/2021	Pomona Valley Transit Authority - First Transit	2120 Foothill Blvd. #116	La Verne, CA 91750

PROJECT	ATTENTION	PHONE	E-MAIL
Ecolane APP - Development will be competed on or before Dec. 31, 2021	Tony Mercado, Sr. Director of Operations, South West, First Transit	408-667-2846	tony.mercado@firstgroup.com

ACCOUNT MANAGER	E-MAIL		PHONE	PRICING TERMS
Rex Clark	rex.clark@ecolane.com		530-383-1414	*Option 1: 75% due at system set up, 20% due at completion of training, 5% due at system acceptance. Annual due 1 yr. from contract signing.*

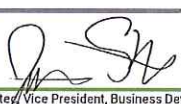| DAYS PRICING IS VALID FOR	DATE PRICE EXPIRES			*Option 2: Part 1. Services and additional items costs due upfront. Schedule of payment for this portion same as Option 1 year 1 cost. Part 2. Sales as a Service (SaaS) with annual payments over 5 years for remainder*
60	7/27/2021			

Initial Licenses

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
1	Ecolane branded Mobile App, Self Service Trip Bookings App with credit card capabilities (flat rate) (3rd party charges will apply to credit card fares) Self Service WEB bundle	$39,995.00	$39,995.00
1	Upgrade to White Label Mobile App (price added onto Ecolane mobile app cost above) (flat rate)	$19,995.00	$19,995.00
Initial licenses subtotal			$59,990.00

Pricing based on MSA March 2020

Services

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
30	Remote setup and Development days (8 hour work day)	$990.00	$29,700.00
Services subtotal			$29,700.00

Annual Licensing Year 1

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
1	All Inclusive Annual Licensing plan includes support for all licenses listed above and all items below	Included	Included
	Hosting Costs		Included
	Server Maintenance		Included
	24/7/365 Support via web, email and phone		Included
	Map Updates		Included
	Upgrades** and Updates		Included
	Free monthly webinar training and access to Aha! Idea portal to help drive functionality for new development for Ecolane and its customers		Included
	Access to Learning Management System (LMS), Ecolane University for all staff for self-paced web-based training		Included
Annual licensing year 1 subtotal			*Included*

		SUBTOTAL	**$89,690.00**
Annual licensing for years 2-5 includes all services listed above in Annual Licensing for year 1. Costs for years 2-5 are indicated below.		**OPTION 1: TOTAL SYSTEM PURCHASE COSTS FOR YEAR 1**	**$89,690.00**
If Option 1 is chosen, Annual licensing will be held at this rate for as long as your agency is an Ecolane customer. (Based on originally purchased solution. Does not include changes to 3rd party charges or data plans)		**ANNUAL COST FOR OPTION 1 FOR YEARS 2-5 (per year)**	**$11,998.00**
		OPTION 2, PART 1: UPFRONT PAYMENT OF SERVICES AND ADDITIONAL ITEMS	**$29,700.00**
		OPTION 2, PART 2: SAAS YEARLY PAYMENTS FOR YEARS 1-5, PER YEAR	**$19,633.00**

5/28/2021

Date

James Step, Vice President, Business Development

THIS PROPOSAL INCLUDES THE CONDITIONS NOTED:

Implementation/Training assumes 8 hrs. per day on-site excluding weekends and holidays.

All prices are in US dollars. All applicable sales/use taxes are additional and payment of such is the sole responsibility of the purchaser.

Customer may purchase Android tablets and airtime for Tablets through cellular provider. Prices for tablets range from $0 to $499 depending on carrier. Please coordinate your cellular provider/tablets with Ecolane prior to ordering hardware.

*Data plan does not include web browsing, etc. 2GB data plan is more than sufficient for the Ecolane Touchscreen MDT Software and Navigation. Agency is responsible for data plan and any overages unless otherwise noted.

**Upgrade and webinar training is included for upgrades, additional on site or new employee training is charged at Refresher Training rate plus travel as applicable.

*** All license costs include annual hosting, support & licensing fees due 1 year from contract signing set at: 20%

Optional Items | Please ask your Biz Dev Director for more info about these great options to help your agency grow!

QUANTITY	DESCRIPTION	UNIT PRICE	ANNUAL COST
1	Fixed Route/Flex (Deviated) Route software license (Initial license cost, per route, includes MDT software license cost) ***	$4,000.00	$800.00
1	Ecolane Routing Engine Package with Open Street Map data *** (Initial License cost, flat rate)	$20,000.00	$4,000.00
1	Business Intelligence tool *** (Initial License cost, flat rate)	$59,995.00	$11,999.00
1	Pre/Post Trip functionality on MDT *** (Initial License cost, flat rate)	$19,995.00	$3,999.00
1	Ecolane IVR *** (Initial License cost, flat rate) (3rd party charges will apply)	$40,000.00	$8,000.00
1	Electronic Signature Capture functionality on MDT *** (Initial License cost, per vehicle)	$200.00	$40.00
1	GTFS Interface for Public Transportation *** (Initial License cost, flat rate)	$19,995.00	$3,999.00
1	SMS Text Messaging Arrival Notification License *** (Includes 10k of SMS Text msg credit to start that never expires) *** (Initial License cost, flat rate)	$19,995.00	$3,999.00
1	SMS Text message credit bundle (10,000/bundle) (Never expires until used up completely)	$1,500.00	
1	Customer Service and Feedback module*** (Initial License cost, flat rate)	$6,995.00	$1,399.00
1	Centers Management Portal *** (Initial License cost, flat rate)	$19,995.00	$3,999.00
1	Ecolane DRT Brokerage (Primary) ***(Initial License cost, flat rate)	$12,995.00	$2,599.00
1	Subcontractor Portal *** (Initial License cost, flat rate)	$9,995.00	$1,999.00
1	Subcontractor Reporting Portal *** (Initial License cost, flat rate)	$6,995.00	$1,399.00
1	Least cost scheduling algorithm for brokerage solution (Initial License cost, flat rate) ***	$6,995.00	$1,399.00
1	Order Importer module *** (Initial License cost, flat rate)	$19,995.00	$3,999.00
1	Test Server including hosting, maintenance and support needed (per year)	$6,000.00	$6,000.00
1	Each additional Week onsite over standard 2 weeks Training/Go-live Support (includes travel)	$8,700.00	
1	Annual Review - Up to 10 days of remote review of your system by a Ecolane Professional Services member and 3 days onsite training (includes travel)	$6,300.00	

Ecolane

Specific Mobile App Modifications

Pomona Valley Transportation Authority

5/28/2021

Specific App Modifications

PVTA Requirements

PASSENGERS CAN REGISTER AND SCHEDULE FOR MULTIPLE SERVICES

Ecolane Response:

Support for General Public will require Ecolane development. Ecolane commits to completing development on or before Dec 31, 2021

- Trip Purpose - The Ecolane mobile app will be set up to use the trip <u>Purpose</u> as the method of choosing a service, including the following:
  - Get About
  - Ready Now
  - One Step
  - Claremont Dial-a-ride
  - San Dimas Dial-a-Cab
  - Pomona Group
  - Claremont Group
  - Regional Center
- Eligibility - Each trip will be verified against the purpose selected for eligibility. The trip will only be booked if the rider is eligible for the purpose that has been selected.
- QR Code feature - This will allow riders to use their QR scanning capability on a mobile platform to reach the app directly

DETAILS FOR EACH TRIP PURPOSE

Ecolane Response:

Ecolane will enable a new API to support a more user-friendly experience. Currently, the app will have a single configuration for the agency time setting for the date/time with a secondary check upon booking. Given the large number of rules, this will be beneficial to enhance. This will be part of a development effort that will be completed by Dec. 31, 2021.

- Get About - Service rules such as service areas, fares, and service hours will match those listed in Ecolane Evolution. Get About trips are to be booked at least one day in advance.

Fares

One-Way Tickets

Regular Service Area	$1.00
Extended Service Area	$2.00

- Ready Now - Service rules such as service areas, fares, and service hours will match those listed in Ecolane Evolution. Ready Now trips can be requested as soon as (no earlier than) 45 minutes in advance. Future date reservations are also accepted. Ready Now trips booked for future dates should also have a pickup window of 45 minutes from the requested time.

Fares

One-Way Tickets	$4.50

- One Step - Service rules such as service areas, fares, and service hours will match those listed in Ecolane Evolution. One Step trips must be booked at least one day in advance.

Fares

Zone 1	$2.50
Zone 2	$4.00
Zone 3	$6.00
Zone 4	$12.00

- Claremont Dial-a-ride (DAR) - Service rules such as service areas, fares, and service hours will match those listed in Ecolane Evolution. Claremont DAR trips can be requested as soon as (no earlier than) 45 minutes in advance.

After hours service

Seniors, disabled persons and children under age 16 can travel 24 hours per day, 7 days a week on Claremont Dial-a-Ride. The (909) 623-0183 number is available at all hours.

Fares

General Public within Claremont	$2.50
Seniors & Disabled within Claremont	$1.50
General Public outside* Claremont	$4.00
Seniors & Disabled outside* Claremont	$2.50
Additional rider**	$1.00

- San Dimas Dial-a-Cab - Service rules such as service areas, fares, and service hours will match those listed in Ecolane Evolution. San Dimas DAC trips can be requested as soon as (no earlier than) 45 minutes in advance.

Fares

General Public within San Dimas	$4.00
General Public outside* San Dimas	$6.00
Seniors & Disabled	$2.50
Additional riders	Free**

- Claremont Group Service is open to everyone representing a group of six or more people. (An adult must accompany children under six)

Fares

General Public within Claremont	$1.00 per rider for six or more riders

- Pomona Group Service is open to everyone representing a group of six or more people. (An adult must accompany children under six)

Fares

Per Rider per one-way trip	$0.50
Per Rider per round-trip	$0.75

- Regional Center- Regional Center rides are limited to the Get about service area. Regional Center fares (Free) and service hours are to match those listed in Ecolane Evolution. Regional Center trips are to be booked at least one day in advance.

- Customized Offerings - Branding options matching agency colors, logos, and style.

TRANSIT AGENCY SPECS

- Self-Service - A rider's access to Self-Service is enabled in the client's profile. The transit agency staff manages the access required for authentication of the usernames and passwords. Transit agencies can limit a rider's access within the self-service feature; for example, some riders might only be allowed to view trips. The same permission and limitations should also exist within the Ecolane mobile app.

Ecolane Response:

The agency can control some of the complex rules for a password and have self-service access; however, only the rider can set their password.

- Privacy - All data communication between Ecolane Evolution and the Self-Service mobile application or website is secure and encrypted.
- Fares - Specifics are needed on how 3rd party charges apply to credit card transactions on the app.
  - Fare reports for credit card payments
  - Ability to transfer funds to the appropriate funding source's account
  - Ability to refund a customer's payment
  - Ability to credit a customer's account
  - Fares should be charged only if the customer fulfills the ride.

Ecolane Response:

Fares are charged at the time of passenger boarding. We need to clarify since "fulfill" could also mean after the ride completes, and that would require additional development.

- Caretaker View - Alerts can be sent to a caretaker or PVTA staff when passenger books a trip.

Ecolane Response:

A confirmation email can be sent to the email on the account at the time of booking. That is probably enough for the caretaker. We cannot currently send it to PVTA staff. That will need additional development and will be part of a development effort completed by Dec. 31, 2021.

APP LOGIC

- All the logic built into the app is tied to the existing Ecolane Evolution software.

RIDER VIEW

Setup and Download

- Google store and Apple store will have the Ecolane app available for passengers to download on any mobile device.
- Self-Registration - Funding sources can determine the freedom to self-register and certify via the mobile app for transit. The self-certification features can be turned on or off as needed.

Ecolane Response:

We will need to alter funding sources so PVTA can have a general hard limit that prevents registration if there is a mismatch or limit that only applies to self-service. Logic will be extended for auto-adding the funding sources at self-registration not to consider it a problem if the user cannot be assigned all funding sources with a self-registration flag. This will be part of a development effort that will be completed by Dec. 31, 2021.

Booking a New Trip

- The rider can log in or register an account.
- The reservation's module should be compatible with accessibility features (text to speech)
- The reservation's module will determine auto eligibility if age or disability requirements are met at the time of registration
- New registrations require the user to input name, DOB, phone, disability type, and emergency contact info.

Viewing Your Trips

- Riders can see their window time with their estimated arrival time.

Ecolane Response:

Estimated arrival time is only available for scheduled drop-off trips. This is done because Ecolane handles arrival windows for some group trips. It can lead to substantial arrival windows that would alarm the rider.

- Riders can see their future trips along with the latest trip details (Provider).

Ecolane Response:

The development required to display providers when viewing trips. This will be part of a development effort that will be completed by Dec. 31, 2021.

- Riders can see their previous trips along with the trip details.

Canceling Your Trip

- Riders can cancel a trip at any time during or before their pickup window. Canceling within the window should prompt a reminder that cancellations should be made at least 30 minutes before the pickup window.

Ecolane Response:

Requires development to show the prompt for cancellation. This will be part of a development effort that will be completed by Dec. 31, 2021.

Monitoring your Trip

- View all aspects of the trip detail to include but not limited to ETAs, vehicle type (possibly vehicle number), driver name, status of trip "vehicle has arrived," and location of the vehicle on a map.

Ecolane Response:

The development required to show vehicle number or driver name. We interpret "vehicle type" to mean make and model. This will be part of a development effort that will be completed by Dec. 31, 2021.

- Riders have the option to receive a (IVR) call with notifications regarding their trip
- Riders have the option to receive a text message with notifications regarding their trip

Ecolane Response:

Development will be required as IVR is not exposed in the mobile app today. However, having the mobile app does not preclude getting IVR calls as well. We would need to do development to allow a rider to sign up for IVR within the app. The same applies to text messaging. This will be part of a development effort that will be completed by Dec. 31, 2021.

Your User Account

- Modify details of your account such as emergency contacts, phone, mobility device, and disability type.

Ecolane Response:

We only expose the mobility device in the app today, so displaying emergency contacts, phone, and disability type will require development. This will be part of a development effort that will be completed by Dec. 31, 2021.

Fares and Payment

- Fares can be paid via credit card securely through the mobile app (3rd party charges will apply). This feature can be turned on as needed
- Fares should be charged only if the customer fulfills the ride.
- Drivers must be notified via the MDT if the trip has been pre-paid or requires payment upon arrival.
  - Details of the Fare use case are in the chart

Events

- All events produced by riders, such as booking a trip, cancellation, and editing, will be recorded in a history database.

Vehicle Type

- The funding source should determine the default provider for said trip. This mobile application should mirror the trip purpose as the funding source.
  - If a passenger requests a Purpose such as "Claremont DAR," the default should be a small vehicle unless requested, and when a wheelchair is requested, a minivan should be sent. Large vans are sent as a last resort.

Ecolane Response:

The mobile app will follow vehicle assignment priorities set in Ecolane Evolution and send the best vehicle as determined by the optimization created around agency service rules.

PHASE PLAN

- We want to Implement the application in phases. Satisfactory beta testing results and successful introduction within Ecolane Evolution for each phase are required before continuing the proceeding phase.

Ecolane Response:

A phased plan will be great. We will work with you to define the exact details of each of the phases and success criteria for each.

Phase 1: Claremont DAR → Phase 2: San Dimas DAC → Phase 3: Ready Now Getabout One Step