National RTAP Peer Call Series: IT Procurement

Tuesday, May 18, 2016
Hosts: Rob Tassinari and Neil Rodriguez, National RTAP
Panelists: Mike Labello, Main Street Connections, Curtis Sims, South Carolina DOT, Frank Thomas, Community Connection of Northeast Oregon
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Questions via Chat

• Submit questions or comments during the call by clicking the drop-down arrow next to “Questions” in the Control Panel.

• Type into the white box and click “Send.”

• We will answer questions in the order they were received.
Questions via Phone – Raise Hand

- To ask a question or make a comment via your phone or mic/speakers, click the “Raise Hand” icon in the Grab Tab.
- We will unmute you when it’s your turn, and then re-mute you when you’re done.
Difficulty Hearing a Speaker

• If you have trouble hearing one of the speakers during the call, let us know via the “Questions” or “Chat” box in the Control Panel and we will try to correct the issue.
This Peer Call is being recorded and will be available on the National RTAP website at http://nationalrtap.org/Peer-Program/Peer-Calls within one week of the peer call. Transcripts can be provided upon request.
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Agenda

• Introduction
• Presentation
• Open conversation
Panelists

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National RTAP
Rural Transit Assistance Program

U.S. Department of Transportation
Federal Transit Administration
RFPs for IT
Wednesday, May 18th, 2016
Good Procurement Protocol

Pre-Procurement Preparation:
- Documented procurement procedures
- Procurement history file

Project Identification:
- Project planning and identification
- Independent Cost Estimate
- Securing funds
- Grant process
- Type of procurement consideration

Solicitation Development:
- Information for bidders
- Technical specifications
- Written Standards of Conduct
- Protest and Appeals Process
- DBE Requirements
- Contract Term Limitations
- Federal clauses and certifications

Solicitation and Bid Opening:
- Advertise without geographic preference
- Approved Equals process
- Pre-Bid Meeting, opening and recording
- Evaluate for responsiveness
- Review in accordance with selection criteria
- Review the Excluded Parties List
- Tabulation of Proposals
- Perform a Cost or Price Analysis
- Award Selection and Justification

Award and Contract Administration:
- Finalize Contract w/appropriate clauses and certifications
- Secure Bonds and Insurance as required
- Develop milestones and anticipated closeout procedures

Project Progress Reports:
- Document progress and challenges of project
- Document “Change Orders” W/Cost or Price Analysis
- Document Progress Payments

Project Closeout and Reimbursement:
- Finalize Milestones
- Begin Physical and Administrative close out proceedings
- Review final project procurement history file
- Request Approval to Close-Out as applicable
Deciding what to procure

IT uses:

- **Financials** – expenses (operating, capital & PM), revenues, subsidies, contracts, performance measures, etc.
- **Operational tracking** – rider, miles, hours, accident data, demographics, contract, etc.
- **Asset management** – Inventory (fleet composition, infrastructure & parts), useful life, needs assessment, characteristics, etc.
- **Maintenance** – PM and FM plans, maintenance cycles
- **Performance measures and indicators** – Program analysis, past performance and current trends.
- **Program and project management** – Reports, budgeting, analysis and short and long range planning.
- **Trip planning & management** – ITS type technologies such as Route Match, Trapeze, StrataGen, and many more for managing multi-ride and even multi-agency needs from a call center or multiple locations.
Getting good information on available technology

Resources:

- Certainly the FTA will always be a good resource for what is current.
- Organizations such as NRTAP, CTAA, APTA, TRB's National Cooperative Highway Research Program (NCHRP) and state advocacy groups have a wealth of knowledgeable staff that span many technical areas.
- State DOT’s are another valuable resource that may offer purchasing schedules that include IT solutions and also have knowledgeable staff that may have insight on functionality.
- Existing manufactures/developers of – IT and ITS technologies such as farebox technology, database technology, GIS platforms, innovative software programs, etc.
- Peer to Peer – Those who may have acquired similar technologies should be consulted to gage the problems they encountered and their satisfaction with functionality and learning curve.
- National ITS Architecture Policy - specifically (1) Regional ITS Architecture in place that may help plan, predict, and guide your own ITS deployment; (2) the use of the systems engineering process; and (3) the use and implementation of US DOT-supported ITS standards.
Common procurements and problems

Common Procurements:

- Computers, copiers, printers are common place and generally part of operational expenses. Generally micro or small purchases by FTA standards.
- Maintenance software is also very common.
- ITS technology is highly sought after for vehicle location, trip planning and mobility management. Can be very costly with a high learning curve.

Common problems include:

- Limited training
- High learning curve
- Sales pitch often more impressive than actual functionality
- RFP not explicit enough, opening the door for the shelf products that do not compliment the true need.
- On-going costs for maintenance, support, updates and license fees can be unpredictable.
- FTA National ITS Architecture often overlooked.
Strategies to plan and develop solicitations

- Again I would look to existing organizations and peers who may have researched, developed and acquired similar technologies to understand successes and challenges they encountered.
- Past used RFP’s that produced products of good functionality.
- Talk to vendors who have a potential product that may fit the bill.
- Be wary of vendors providing technical specifications as they have off the shelf products that they are pushing with those specs.
- The National ITS Architecture process can provide insight to technology already in existence that may be useful and possibly even have been procured with options. Institutional integration of systems, agencies and jurisdictions should understand the benefits of ITS and the value of being part of an integrated system.
- Understand that federal procurement standards apply. Documented acquisition processes needs to take place.
Let's start the conversation
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National RTAP Webinar: Procurement 101

- Wednesday June 15, 2016 at 2:30 PM EDT
- Ryan Hammon – FTA Region 8 – Procurement Basics
- Mike LaBello – Main Street Connections – Case Studies and ProcurementPRO
Future Peer Calls

• Calls are generally on the 3rd Wednesday of every other month at 2:30pm Eastern

• What topics would you like to see for upcoming peer calls? Let us know now or in the post-call survey

• Possible topic ideas:
  – ADA Reasonable Accommodation Change
  – Asset Management for Rural Agencies

• Discuss issues you have in these topic areas, ask questions, and share ideas and solutions
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