

## **STAFF REPORT**

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**DATE:** November 14, 2022  
**TO:** Sacramento Regional Transit Board of Directors  
**FROM:** Shelly Valenton, Deputy General Manager/CEO  
**SUBJ:** APPROVING A SOLE SOURCE PROCUREMENT FROM TRAPEZE SOFTWARE GROUP, INC. AND DELEGATING AUTHORITY TO THE GENERAL MANAGER/CEO TO APPROVE AND EXECUTE THE SECOND AMENDMENT TO THE SOFTWARE MAINTENANCE AGREEMENT - 2002

### RECOMMENDATION

Adopt the Attached Resolution.

### RESULT OF RECOMMENDED ACTION

This action would allow SacRT to take advantage of new Trapeze software products to streamline business processes and achieve efficiencies.

### FISCAL IMPACT

Total consideration in the amount of \$303,196 in one-time costs is required for the Trapeze OPS update. Of this, \$251,000 has been awarded to SacRT by Caltrans through a State of Good Repair (SGR) grant. The remaining one-time costs of \$52,196, as well as Year 1 annual support in the amount of \$24,993, is budgeted in the IT Operations budget. Future year maintenance costs for this specific product will be based on Trapeze's then-current pricing and will be paid for the duration of the life of the software. There is no cap on the annual fees.

### DISCUSSION

SacRT has been using Trapeze since 2002, when, as the result of a competitive procurement, the Board of Directors awarded Trapeze a contract for the purchase and implementation of an integrated solution to assist SacRT with:

- Fixed route scheduling system
- Operator run-cutting system
- Operator dispatch and timekeeping
- Customer contact tracking system
- Trip planning
- Route planning and performance reporting

SacRT has two Software Maintenance agreements in place for the existing software that require the payment of annual support fees for the existing software suite.

In August 2020, Caltrans District 3/North Region awarded SacRT \$251,000 of SB1 SGR funding for the Trapeze OPS update. This update will extend the functionality of SacRT's existing Trapeze modules and provide employees greater flexibility in accessing and updating Trapeze data in real-time via the Internet and mobile applications, as well as providing SacRT dispatchers the ability to see critical operational information and messages in real-time on a display board. This update will also enable Staff to access the employee information and operator bidding system online using the Internet and smart phones. The Trapeze update includes software licensing, implementation, go-live support, training, and ongoing maintenance for:

- **OPS-Web** to automate the work bid process for transportation operations and allow operators to enter bid requests;
- **Employee self-service (ESS)**
- **OPS-Mobile** to provide operators the ability to bid on work from their mobile devices, access additional employee information and work schedules; and
- **OPS-Display Board** to provide a dynamic platform for quickly presenting critical information and messages to SacRT operators including real-time bidding and dispatch information and let dispatchers plan and execute better daily service.

Due to the proprietary nature of the software, there is no other vendor that can provide these services. Caltrans has approved SacRT entering into a sole source procurement with Trapeze for these new software products.

To proceed with the OPS-Web update, SacRT must upgrade its existing Trapeze software from version 19 to version 21. While SacRT is eligible to upgrade the software at no cost under its existing Software Maintenance Agreement, Trapeze will also provide version 21 go-live support and training as part of the new scope of work.

Both the software licenses and the associated professional services for these upgrades will be included in the Second Amendment to Software Maintenance Agreement – 2002. Trapeze is still reviewing the State Grant Contract Provisions that are required to be included in the Second Amendment as a condition of the Caltrans grant funding. Once those have been reviewed and resolved, the parties should be able to move forward with the Second Amendment.

Under Resolution No. 21-12-0140, approved by the Board of Directors last year, the General Manager/CEO will be authorized to pay the on-going annual support fees for the new software products for as long as they are used by SacRT.

It is anticipated that the Trapeze update will create a positive experience for passengers and employees, increase productivity, and create long-term cost savings for SacRT through:

- Automating time-consuming, labor-intensive tasks, including sign-ups, open work assignments, driver check-in/check-out

- Improving response times to unexpected events including absences, accidents, and work/employee incidents
- Reducing human error and the number of data entry hours needed by dispatch and administrative staff to maintain records
- Introducing process efficiencies by automating bid configuration and employee bidding for regular work, extra work, time off, etc.
- Facilitating better focus of employees on their essential daily tasks
- Providing employees enhanced access to their information including checking their schedule using smartphone
- Facilitating the ability to bid of work from remote locations using smart phones or personal computers
- Providing employees greater convenience in accessing pertinent work data
- Replacing multiple manual paper process currently in use

RESOLUTION NO. 2022-11-131

Adopted by the Board of Directors of the Sacramento Regional Transit District on this date:

November 14, 2022

**APPROVING A SOLE SOURCE PROCUREMENT FROM TRAPEZE SOFTWARE GROUP, INC. AND DELEGATING AUTHORITY TO THE GENERAL MANAGER/CEO TO APPROVE AND EXECUTE THE SECOND AMENDMENT TO THE SOFTWARE MAINTENANCE AGREEMENT - 2002**

NOW, THEREFORE, BE IT HEREBY RESOLVED BY THE BOARD OF DIRECTORS OF THE SACRAMENTO REGIONAL TRANSIT DISTRICT AS FOLLOWS:

THAT, since it was competitively procured in 2002, SacRT has used software from Trapeze Software Group, Inc. as integrated Transportation Efficiency and Accessibility Management System suite for bidding, scheduling, dispatching, trip planning and reporting, as well as other features; and

THAT, a transition to another vendor for these services would be cost-prohibitive; and

THAT, pursuant to Section 1.405.B.1 of the Procurement Ordinance, the software products and support needed to upgrade SacRT's existing Trapeze software suites can only be provided by Trapeze Software Group, Inc. and it would be futile to seek competitive, justifying a sole source procurement; and

THAT, authority is delegated to the General Manager/CEO to approve and execute the Second Amendment to Software Maintenance Agreement – 2002 by and between the Sacramento Regional Transit District (therein "Licensee") and Trapeze Software Group, Inc. (therein "Trapeze") wherein Trapeze agrees to provide new software products and professional implementation and training services, as further set forth therein, for an amount not to exceed \$303,196, upon satisfactory completion of contract negotiations.

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STEVE MILLER, Chair

A T T E S T:

HENRY LI, Secretary

By: \_\_\_\_\_  
Tabetha Smith, Assistant Secretary