

# SAN LUIS OBISPO COUNCIL OF GOVERNMENTS

## STAFF REPORT

<b>MEETING DATE:</b> February 5, 2014	<b>Item:</b> D-6
<b>SUBJECT:</b> Request for Proposal (RFP) for Online Ride Matching and Incentive Management System	

### SUMMARY

This staff report requests Board approval to begin the Request for Proposal (RFP) process for a potential upgrade to the current online ride matching and incentive management system currently operated and maintained by Rideshark, Inc.. This online ride matching tool, otherwise known as iRideshare.org, is used by SLO Regional Rideshare for ride matching, incentive management and campaign focused contests.

Project cost is \$45,000 for creation of new system plus two years operations and maintenance.

### RECOMMENDATION:

**Staff:** Approve distribution of Request for Proposal (RFP) for online ride matching and incentive management system.

**SSTAC/TTAC/CTAC:** Not reviewed

### DISCUSSION:

iRideshare.org – Rideshare’s online ride matching and incentive management system – is currently hosted by Rideshark, Inc.. Our contract with Rideshark.com has expired and we are now operating on a month to month basis. We are requesting the Board approve proceeding with a request for proposal (RFP) to determine if Rideshark.com continues to be the best partner for this system or if there is a more robust system available to offer the public.

Rideshark, Inc. has been administering our online software system since October 2009. They have upheld the technical facets of the systems functionality and have worked hard to keep up with the growing technology surrounding online matching systems. That being said, Rideshark has had deficiencies in optimizing the site for user retention and updating the site to have intuitive workflows. We have noticed system capacity issues manifesting as slow service, glitches in the point structure and inconsistency in data reporting from one report to another within the system. We also continue to receive feedback from new and existing users on the lack of intuitiveness of the interface. These challenges are common to most Transportation Demand Management (TDM) systems built in the last decade. As with any technology, TDM software like this is constantly changing and improving. It is our intent through this process to have these deficiencies addressed either by Rideshark or another TDM online system provider. There are multiple potential partners for this type of software system and Rideshare is looking forward to evaluating each system against one another.

### FISCAL IMPACT:

Project cost is \$45,000 for creation of new system plus two years operations and maintenance. This project is paid for with Service Authority for Freeways and Expressway (SAFE) funds.

## SCOPE OF WORK/SERVICES

The specific scope of work is outlined below. The selected consultant(s) will receive general direction from Rideshare staff assigned to this project. It should be noted that the deliverables schedule provides a conservative time estimate and that Consultants should include timeline adjustments were appropriate.

Title	Description	Required /Optional (R/O)	User Group/ Portal
<b>A. Matching</b>			
	Carpool matching along a corridor between origin, destination, or midpoint or within a set distance from each end of the trip	R	User
	Ability to modify parameters (i.e. miles, times, start/mid/end point, set contact preference to email or phone, and select confidentiality parameters)	R	User
	Option to select a park and ride lot, employer work site, or a community landmark/facility as a commute point	R	User
	Vanpool coordination features that enable vanpool coordinators to manage their vanpools online, indicating when empty seats are available, monthly fees, pick-up locations and times	O	User
	Enable ride matching within the portal group or within larger groups of registered users	R	Rideshare & Employer
	Casual Carpool functions	O	User
	Transit route planning using Google Transit or proprietary system	O	User
	Bike commuter matching	O	User
	Ability for individual users to 'opt out' of the commuter matching portion of the system yet still remain active with the commute calendar	R	User
	Generate maps that show: commuter match list result locations, commute trip route and meeting place(s), Park and Ride locations (formal and informal) and possibility to add transit routes and bike paths	R	User
<b>B. Confidentiality and Communications</b>			
	Pre-draft email correspondence that can be personalized	R	All
	Users must acknowledge reading disclaimers and safety warnings prior to registering and finding matches	R	User
	Preservation of personal information as confidential	R	User
	Personal information is not to be sold or shared beyond limited access granted to employers, and the service ensures that the program complies with all local, state, and federal privacy legislation and protects database security	R	All
	Send group list messages (also available by mode and registration date) prior to database purging	R	Rideshare
	Send outreach marketing messages and promote incentive programs	R	Rideshare

	Email management service that distinguishes between groups by information type, such as zip code, mode, employer or city	R	Rideshare
<b>C. Administrative Functions and Data Collection</b>			
	Daily/weekly commuter “calendar” that tracks the time and mode of travel for each user	R	User
	Ability to group/link fellow carpoolers and vanpoolers with each other to identify groups of carpoolers or vanpoolers	R	Rideshare
	Ability to delete or block users	R	Rideshare
	Ability to reset or recover user password and login	R	Rideshare
	Ability to filter emails containing inappropriate language	R	Rideshare
	Ability to periodically and regularly schedule purges on stale and inactive data	R	Rideshare
	Ability to select active users (those who use the online calendar) from the database randomly by mode	R	Rideshare
	Management of Rewards incentive program	R	Rideshare
	Management of Emergency Ride Home program	R	Rideshare
	Ability to update email list in Mail Chimp directly from user list via rideshare matching system	O	Rideshare
	User data can be exported in Microsoft Excel	R	Rideshare & Employer
	Allow users to enter data into calculators that demonstrate cost savings and air quality emissions reduction. Users can view automatically calculated year-to-date savings/reductions on their personal profile, download their history and print	O	User
<b>D. Reporting</b>			
	Trips, miles and emissions information from user commute calendars by user, employer, mode or region	R	Rideshare & Employer
	Rewards invoicing, redemptions, users and points within rideshare matching system	R	Rideshare
	Ability to cross reference data from various reports within rideshare matching system	R	Rideshare
	User website visits	R	Rideshare
	User registrations (individual and employer)	R	Rideshare
	Employer activity (login, database size, incentives offered)	R	Rideshare & Employer
	Statistics comparison over time (monthly, quarterly, etc.)	R	Rideshare
	View summary page (company name, contact name and contact information, number of employees participating)	R	Rideshare & Employer
	Employer listing by company name, number of employees	R	Rideshare
	Ability to save standard reports for repeated use, and/or create custom reports as needed	R	Rideshare/ Employer
	Generate reports that show previous login date, potential matches, miles reduced, trips reduced, emissions reduced and commuter savings	R	ALL
	Generate reports for the employer such as: Employee list of Rideshare participants, date registered, start and ending locations and mode choice; employers may select from standard reports or create their own; and	R	Employer

	employers may choose random users in database		
	Ability to track user referral methods and reasons for using rideshare matching system.	O	Rideshare
<b>E. Design and customization</b>			
	Provide customizable options for design, look and feel of the website so it is seamlessly integrated into the <a href="http://www.Rideshare.org">www.Rideshare.org</a> website and users clearly understand Rideshare is the service provider	R	Rideshare
	Employer portals or pages managed by employers that can feature employer-based commuter programs, promotions and logo	R	Employer
	Allow employers to view Rideshare uploaded documents such as Trip Reduction Plans, Rewards invoices, surveys, etc.	R	Employer
<b>F. Incentives</b>			
	Enrollment and tracking of employer or Rideshare promotions and incentive events which may include multi-modal team competitions, separate modules	R	Rideshare & Employer
	Ability to create customizable modules for incentive campaigns such as Bike Month and Rideshare Month	R	Rideshare
<b>G. Emergency Ride Home</b>			
	Emergency Ride Home (ERH) interface that allows users to submit request forms and track reimbursement process	R	Rideshare, Employer, User
	Ability for user to view total ERH left (4 total each fiscal year, automatically updated when request processed)	R	User
	Clickable ERH link on the user page with information about the program, numbers to call and procedures	R	User
	Accessible online ERH Reimbursement Form. Once filled out, the form can be submitted online (via rideshare matching system) and a notice sent to Rideshare	R	User & Employer
	Ability for user to view their submitted reimbursement requests and status updates, as to whether it has been processed, accepted or denied (and why), whether payment has been sent, how much is being reimbursed and when the check was sent	O	User
<b>H. Rewards Program</b>			
	Rewards commuter store that tracks users Rewards points and allows them to manage redemptions	R	User
	Only companies/users authorized by Rideshare will be able to generate Rewards	R	Rideshare
	Rewards points to be automatically generated from participating users commute calendars and viewable on the users profile page	R	User
	Users able to view Rewards offered in the commuter store, click for more information, add to cart and checkout. Once an item has been "requested" and "approved" from Rideshare Admin, user to be sent a pre-generated email confirming the purchase	R	User & Rideshare
	A downloadable report with past commuter store purchases and the status of recently submitted items	R	User & Employer

<b>I. General System Requirements</b>			
	Users and employers currently in online iRideshare.org system automatically rolled into the new system	R	User & Employer
	Transition Plan of phasing out iRideshare.org system and launching new matching system	R	Rideshare
	Demonstrate that the service is robust enough to accommodate future growth, customer demand for usability and adapt to future Rideshare matching technologies	R	Rideshare
	Provide telephone and/or electronic troubleshooting	R	Rideshare & Employer
	Produce a Service Operating Manual with a section that may be provided separately to employer administrative users	R	Rideshare & Employer
	Offer users several opportunities during registration to contact Rideshare via email or phone (during business hours) to request presentations, provide feedback, request materials, or ask questions	R	User & Employer
	On commuter profile page or at login, provide a Rideshare events calendar so users can receive information on events and services	R	User
	Ensure that the implemented system is available in English and Spanish	R	ALL
	A notice of offline reporting, electronically or by phone within 24 hours of a break in service. If any down time greater than two hours is encountered, a written report within two days will be sent electronically, documenting the problem and the steps taken to remedy the situation	R	Rideshare
	Training of Rideshare staff during initial launch and to all new Rideshare administrator staff during two year contract.	R	Rideshare
<b>J. Interface</b>			
	Seamless, time efficient, user friendly sequence of tutorial windows for first time users that once read can be opted out of by user for return trips to site	R	Rideshare
	All pages of rideshare matching system should have a current look & feel using graphics and color schemes that follow Rideshare branding guidelines	R	Rideshare
	Ability to push user activity to social media sites (facebook, twitter etc.)	O	User

Staff report prepared by Rideshare staff