

October 7, 2011



**AUTHORIZE EXECUTION OF A SERVICES AGREEMENT WITH
ONTIRA COMMUNICATIONS, INC., RELATIVE TO REQUEST FOR PROPOSALS
NO. 2012-D-1, CUSTOMER COMMUNICATION SERVICES PLATFORM UTILIZING
INTERACTIVE VOICE TECHNOLOGY**

Recommendation

The Transportation Committee recommends that the Board of Directors approve actions as follows:

1. Authorize execution of a Services Agreement to Ontira Communications, Inc. (Ontira), Toronto, ON, Canada, relative to Request for Proposals (RFP) No. 2012-D-1, *Customer Communication Services Platform Utilizing Interactive Voice Technology*, to provide a customer communication services platforms utilizing interactive voice recognition, including modules for interactive voice recognition assistance at the District's main telephone numbers, and automated bus operator assignment information for the lump sum implementation cost of \$84,600, and a monthly maintenance and operating cost of \$4,983 (\$59,796 annually) for a three-year base term, subject to negotiations of final terms and conditions by the General Manager; and,
2. Authorize the General Manager to exercise two one-year options to the three year base term, if in the District's best interests, in the not to exceed amount of \$67,236 per year,

with the understanding that funds for implementation and the first year's annual service are included in the FY 11/12 District Division Capital Budget. Funds for annual services following the first year will be budgeted accordingly in the District Division Operating Budget for future years.

Summary

Facing a current \$89 million five-year projected deficit, the Board approved the *Financial Plan for Achieving Long-Term Financial Stability* (Financial Plan) on October 30, 2009. This recommendation relates to Initiative #2, *Further Reliance on Automated Information for Transit Customers*. On April 8, 2011, the Board of Directors approved an action to reorganize the Customer Service Center, including implementation of an automated telephone processing system.

Automated Interactive Telephone Voice Recognition Processing System

Over half of all telephone calls received into the Customer Service Center are routine transit or schedule-related inquiries. Staff has identified an automated attendant software system capable of effectively handling routine and schedule-related customer telephone calls. This system would

route calls from the regional 511 number into the District's system and would greet callers, identify the nature of their inquiry, and route the call through appropriate channels. The system is able to access downloaded bus schedule information and provide next scheduled departure information from a particular location for buses and ferries. The automated information will provide 24/7 access for our customers. Currently, customers can receive schedule information via the Customer Service Center only during hours the center is staffed (Monday-Friday 7 a.m. to 7 p.m. and Saturdays 8 a.m. to 6 p.m.). For customers without internet access, the automated system will provide bus and ferry schedule information regardless of the hours the Customer Service Center is staffed.

On June 22, 2011, the District issued RFP No. 2012-D-1, *Customer Communication Services Platform Utilizing Interactive Voice Technology*. The RFP was posted on the District's website and notice of the RFP was sent to 3 potential proposers. The proposal submission deadline date was July 19, 2011, and the District received proposals from the following three companies:

COMPANY

American Telesource, Inc.

LogicTree Corporation

Ontira Communication, Inc., a Division of TranSched Systems LLC

A selection committee, consisting of the Secretary of the District, Marketing, Customer Relations, and Information Systems departments staff, reviewed the proposals. The selection committee evaluated and ranked the firms based on the following selection criteria: 1) Proposal Understanding and Approach; 2) Qualifications and Experience of Firm; and 3) Cost Proposal.

The selection committee agreed that Ontira was the highest-ranked firm, and was best qualified to provide the necessary services at a fair and reasonable price. In particular at the interview, Ontira impressed the selection committee with its understanding of the District's needs and its ability to provide a high quality and flexible solution with an impressive array of user tools.

In addition to Ontira's proposal being the most competitively priced of all proposers, the system will be hosted externally with 24x7 monitoring and support to ensure availability and capacity, creating additional operational efficiencies for the District.

No specific Disadvantaged Business Enterprise (DBE) goal was established for this contract. The DBE Program Administrator has determined that Ontira has complied with the DBE requirements applicable to this contract. At this time, no DBE participation is anticipated during the performance of this contract.

Background

System Features and Functionality

The system being proposed by Ontira provides the capability to respond to incoming communications via voice, touch-tone keypad, and SMS messaging, and deliver outgoing communications via automated voice, email, and SMS. All information will be available in both English and Spanish. The externally hosted system is guaranteed to have an up-time of 99.8%

and is scaled to allow for 25,000 calls or SMS text messages per month. The District currently receives fewer than 10,000 calls per month.

Optional Modules

The RFP provided proposers the opportunity to submit optional components associated with the base system. Ontira submitted proposals for an automated system available in both static and dynamic formats for the District's administration telephone lines, and an automated bus operator assignment system for extraboard assignments.

The automated system for administration telephone lines will allow interactive voice recognition for people calling into the District's main administration telephone number. Using speech recognition automation, the system will transfer callers to their intended parties and help route general information calls back into the Customer Service Center system without the need for human interaction. This will provide technological efficiencies to District operations. Staff intends on implementing a dynamic system, wherein callers could "search" by name or department. A static component only allows for a fixed call structure without the search functionality.

Another option Ontira proposed was Crewline module, which allows bus operators to call in and obtain extraboard assignment information for the current and next day. This functionality will provide information on reporting location, times, and all associated assignment details. This product will integrate into the District's HASTUS system and will significantly reduce the telephone calls dispatchers receive each day from bus operators trying to learn their current and next day's assignments. Bus staff believes this will assist dispatch operations.

Current Project Schedule

Implementation of the procurement and testing of software system is estimated to take 80 days. If approved by the Board, the schedule of the technical components of the base system will be as follows:

- Procurement of Systems – November
- Systems Installation/Testing – January/February
- "Soft Launch" of System (Live Testing) – February/March

Fiscal Impact

The Customer Service Center Reorganization project is included in the FY 11/12 District Division Capital Budget in the amount of \$250,000 and is 100% District funded. This budget covers the cost of the implementation and first year's maintenance and operations cost for the voice recognition software, which is the subject of this item, and also moving Customer Service Center staff to the San Rafael Transit Center, as well as converting the physical space for the employees. Sufficient funds are available to support these activities.

Funds for annual services following the first year will be budgeted accordingly in the District Division Operating Budget for future years in the amount of \$60,000.