

**Metropolitan Transportation Commission
Operations Committee**

June 12, 2020

Agenda Item 4g

Purchase Order Amendment - Technical Salesforce Integration and Administration Services: Sapient Corporation (\$1,766,000)

Subject: Purchase Order Amendment - Technical Salesforce Integration and Administration Services: Sapient Corporation (\$1,766,000).

Background: In December 2018, this committee approved a purchase order with Sapient Corporation (formerly known as Vertiba, LLC), to develop a customer relationship management system in Salesforce for the means-based transit fare pilot program, Clipper® START, and as an underlying foundation for future expansion to other programs. The principles guiding the design of the system included 1) supporting a customer-friendly experience, 2) streamlining administrative processes, and 3) ensuring long-term program flexibility.

Once launched, pending the conclusion of shelter-in-place, the Clipper START website will provide the ability for low-income adults to apply for discounted transit fares and manage their accounts. The user-centered design, developed directly on the Salesforce platform and tested with potential users of the service, ensures a high quality, simple, and dignified experience at every interaction with the customer. Data entered through the program website will be securely stored for operations and administration of the program, allowing MTC and partners to track key performance indicators to better understand how to serve low income transit riders. Within the Salesforce customer service portal, a separately-contracted third party (Cubic Transportation Systems, Inc.) will confirm eligibility status and verify applications, and then automatically transfer eligible customer information for Clipper card processing and distribution. Finally, Salesforce's case management features will enable customer service staff to efficiently resolve customer concerns and issues.

The underlying foundation in Salesforce was built to provide the infrastructure necessary to ultimately scale to other services and deliver a cohesive, innovative, and customer-centric experience across programs while automating and streamlining legacy processes. Under the proposed amendment, Sapient Corporation would leverage and further extend the Salesforce platform for the following projects:

1. migration of the database for the Regional Transit Connection (RTC) discount card for persons with disabilities, and design and development of an online application, eligibility verification, and customer service processes (\$415k);
2. migration of the Regional Eligibility Database (RED) for paratransit (\$415k);
3. migration of the MTC/ABAG agency contact database and development of processes to support interagency and public communications (\$300k);
4. launch support for Clipper START and post-launch enhancements once shelter-in-place has lifted (\$105k); and
5. ongoing operations and enhancement of the above projects, as well as an existing customer case management system for FasTrak® built by Sapient under a separate purchase order (\$535k).

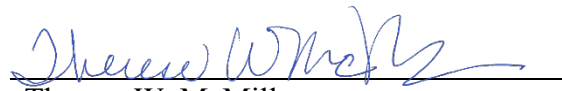
Under this purchase order amendment, Sapient Corporation would provide technical integration and professional services to design, develop, and support the Salesforce projects listed above, along with other possible Salesforce integration projects that may be identified. The work is expected to be completed in fiscal year 2020-21. Sapient Corporation's services were procured using the California Multiple Award Schedule (CMAS), a collaborative intergovernmental procurement vehicle, which satisfies MTC's competitive procurement requirements. Sapient Corporation is an authorized vendor under CMAS and has been recognized as a Platinum Salesforce Consulting Partner. Sapient Corporation has successfully developed similar account platforms and application processes in Salesforce for the DAHLIA San Francisco Housing Portal and LA Metro's TAPforce. Sapient Corporation also completed an internal customer service escalation process in Salesforce for FasTrak, which was delivered on-time and within budget. Sapient Corporation is neither a small business nor a disadvantaged business enterprise and currently has no subcontractors.

These efforts are required for MTC to meet Resolution No. 4320, Regional Means-Based Transit Fare Pilot Program requirements and are essential to the launch and ongoing operations of the Clipper START program. These efforts are also critical to ongoing support of FasTrak® customer service, upgrades to legacy database technology in support of streamlined operations and risk reduction, and provision of services to persons with disabilities, as mandated by the Americans with Disabilities Act of 1990. These efforts are dependent upon future work for operations and maintenance of these regional programs on the Salesforce platform.

Issues: No issues identified.

Recommendation: Staff recommends that the Operations Committee authorize the Executive Director or designee to issue a purchase order amendment to Sapient Corporation in an amount not to exceed \$1,766,000 to continue to provide technical Salesforce integration and administration services.

Attachments: None.


Therese W. McMillan

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Purchase Order Amendment

Work Item No.: 1161, 1252, 2700, 1311

Consultant: Sapiient Corporation (formerly Vertiba, LLC)
Westminster, CO

Work Project Title: Technical Salesforce Integration and Administration Services

Purpose of Project: To provide technical integration and administration services for Salesforce platform development.

Brief Scope of Work: Provide technical integration and professional services to design, develop, and support expansion of Salesforce platform developed for the Regional Means-Based Transit Fare Pilot Program to other regional and internal customer account management program needs.

Project Cost Not to Exceed: \$1,766,000

Funding Source: CARES, STA, FHWA, STP/CMAC, OBAG, RM2, RM3, SB1 State of Good Repair, LCTOP, BATA Rehab, General Funds

Fiscal Impact: \$1,766,000 is subject to approval of the FY 2020-21 MTC budget, as follows:

- RTC/RED: \$928,000 - CARES, STA, FHWA, STP/CMAC, OBAG, RM2, RM3, SB1 State of Good Repair
- Clipper START: \$441,000 - LCTOP
- FasTrak: \$25,000 - BATA Rehab
- Agency Contact Database: \$372,000 - General Funds

Motion by Committee: That the Executive Director or designee is authorized to issue a purchase order amendment to Sapiient Corporation for technical Salesforce integration and administration services described above and in the Operations Committee Summary Sheet dated June 12, 2020 and that the Chief Financial Officer is authorized to set aside \$1,766,000 for such amendment subject to necessary budget approvals.

Operations Committee: _____
Dave Cortese, Chair

Approved: Date: June 12, 2020