



A Jewel in the Rough:
*Articulating Your Vision
for Technology in RFP Form*

National Center for Mobility Management

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Kevin Chambers, Full Path Transit Technology

Types of Technology

Internal-Facing

- Scheduling & Dispatch
- Asset Tracking

Customer-Facing

- One-Call/
One-Click Systems
- Web Site
- Booking Portals
- Mobile Apps

In-Vehicle Technology

- CAD/AVL/Tablets
- APCs
- Cameras
- Annunciators
- E-Fare



Today's Focus:
The Most
Daunting
Procurements

- Custom Requirements
- Complex workflows
- Immature Technology
- Rapidly Shifting Landscape
- Coordination

The challenges of technology are the challenges of complex infrastructure

What's the Jewel?

- Your mission
- Your values
- Your strategic plan
- The core motivations driving your procurement

What's the Rough?

- The procurement process
- Technology





Agencies should be
in the driver's seat

Identify your steps to being an *expert*

- Have conversations with vendors
- Reach out to other agencies
- Talk with knowledge aggregators
- Attend conferences with a game plan
- Look at adjacent industries
- Ask about costs and service at every opportunity
- Consider bringing in a consultant

Expect and plan for this to take time

Framing Matters



Defining the Problem is Key

- What's the underlying need?
- Don't include a preconceived solution as part of your problem
 - “We don't have an app”
- Technology is never an end unto itself
- Operations tech is a different beast entirely

Know thyself

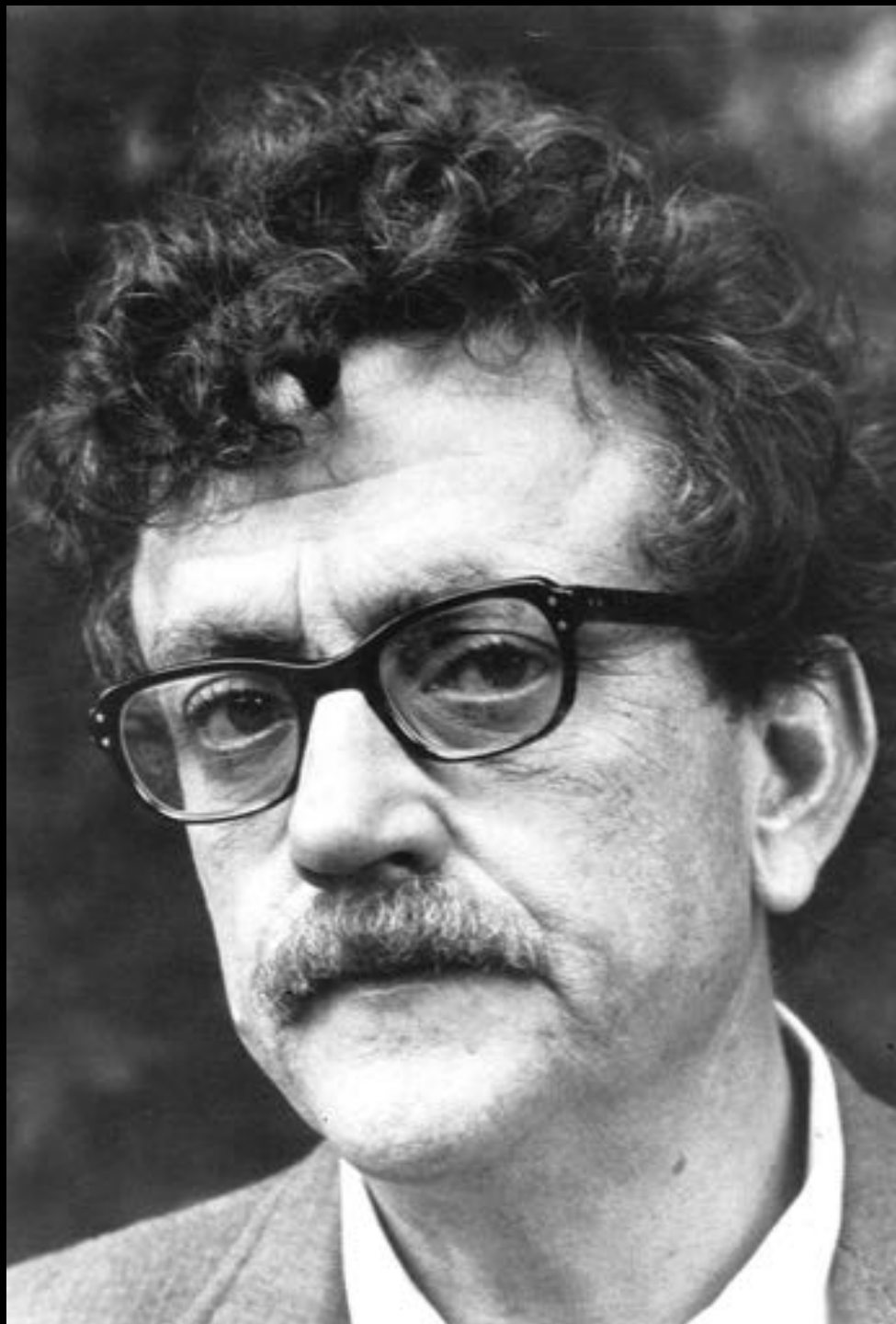
What's
Your
MVP?



Start from your Minimum Viable Product

- Know what's important
- Clearly define the core problem you're working to solve
- Rank ruthlessly
- If everyone is special, no one is
- The smaller the problem space, the simpler the solution can be
- Use your MVP as an engine for institutional learning

Complexity Maintenance



“Another flaw in the human character is that everybody wants to build and nobody wants to do maintenance.”

—Kurt Vonnegut

What Are the Opportunity Costs of the Technology You Want?

- Technology is limited primarily by our ability to manage its complexity
- Complexity requires love and attention
- Everything requires maintenance: the software, the hardware, and the data
- Establish ownership for each element
- One approach: work backward from the resources you'll have to maintain what you procure

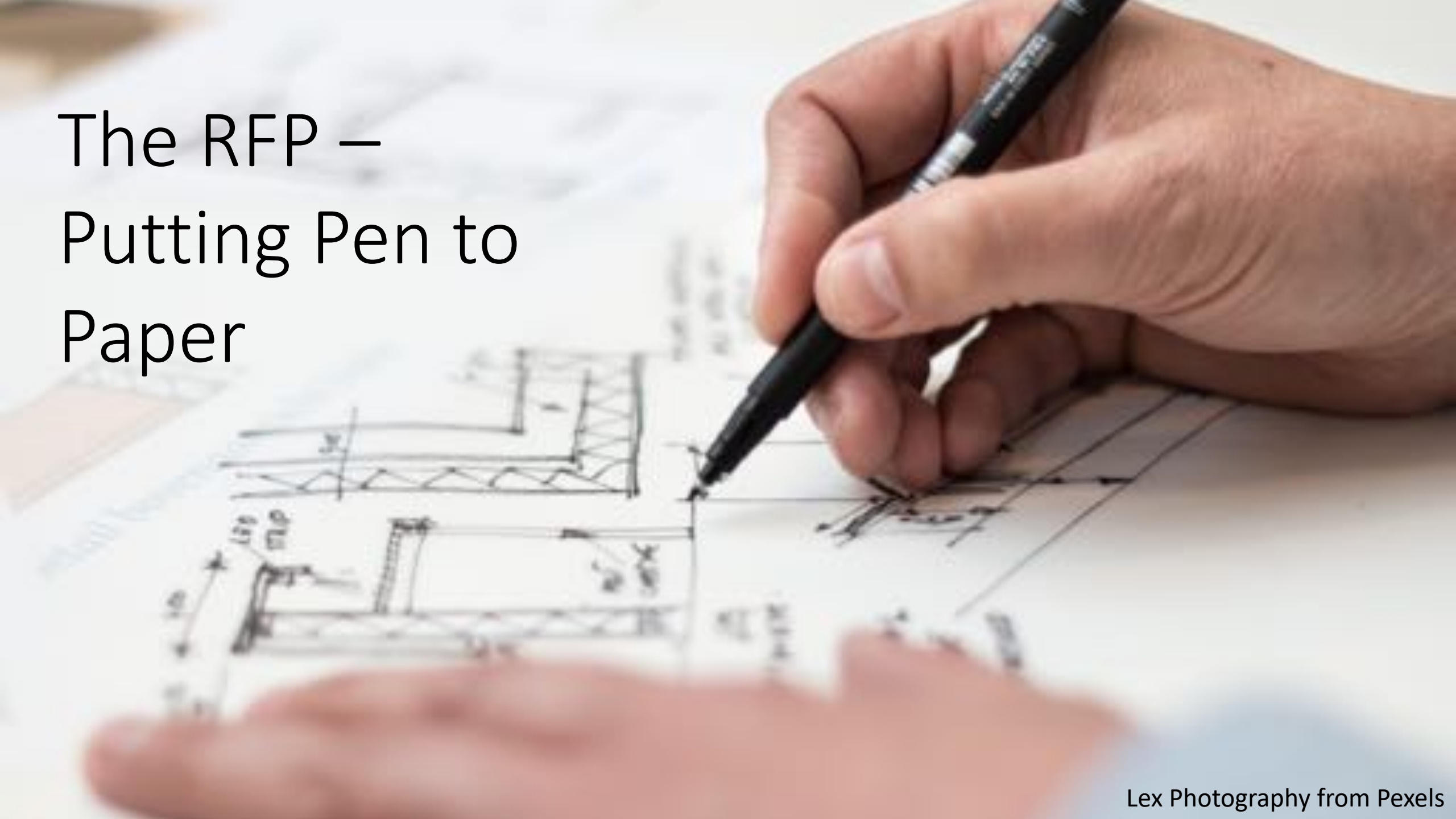
Future-Proofing

A photograph of a two-lane asphalt road with double yellow lines, curving gently through a lush green landscape. The road is the central focus, leading the eye from the foreground into the distance. The sky is bright and slightly hazy, suggesting a clear day. The overall mood is one of forward movement and optimism.

Industry Trends

- Mobility as a Service (MaaS) as the new paradigm
- Platform companies
- Modularity & scalability
 - Internal
 - External
- Service-oriented architectures
- SaaS as delivery model
- What's your API?

The RFP – Putting Pen to Paper



General Procurement Resources

- [*Perfecting the Procurement Process*](#), Community Transportation, 2017
- [Procurement Resource Center](#), National RTAP
- [*WisDOT RFP Procurement Toolkit*](#), October 2017
- [*Best Practices Procurement & Lessons Learned Manual*](#), FTA, October 2016
- Know of more? Let me know!



Not sure what
you want?
Use an RFI

- Using an RFP to determine how you're going to solve your problem is a high-risk venture
- Use an RFI to open the floor to suggestions
- You get ideas and a market survey in one stroke
- Builds relationships with potential vendors

A strong RFP communicates clearly

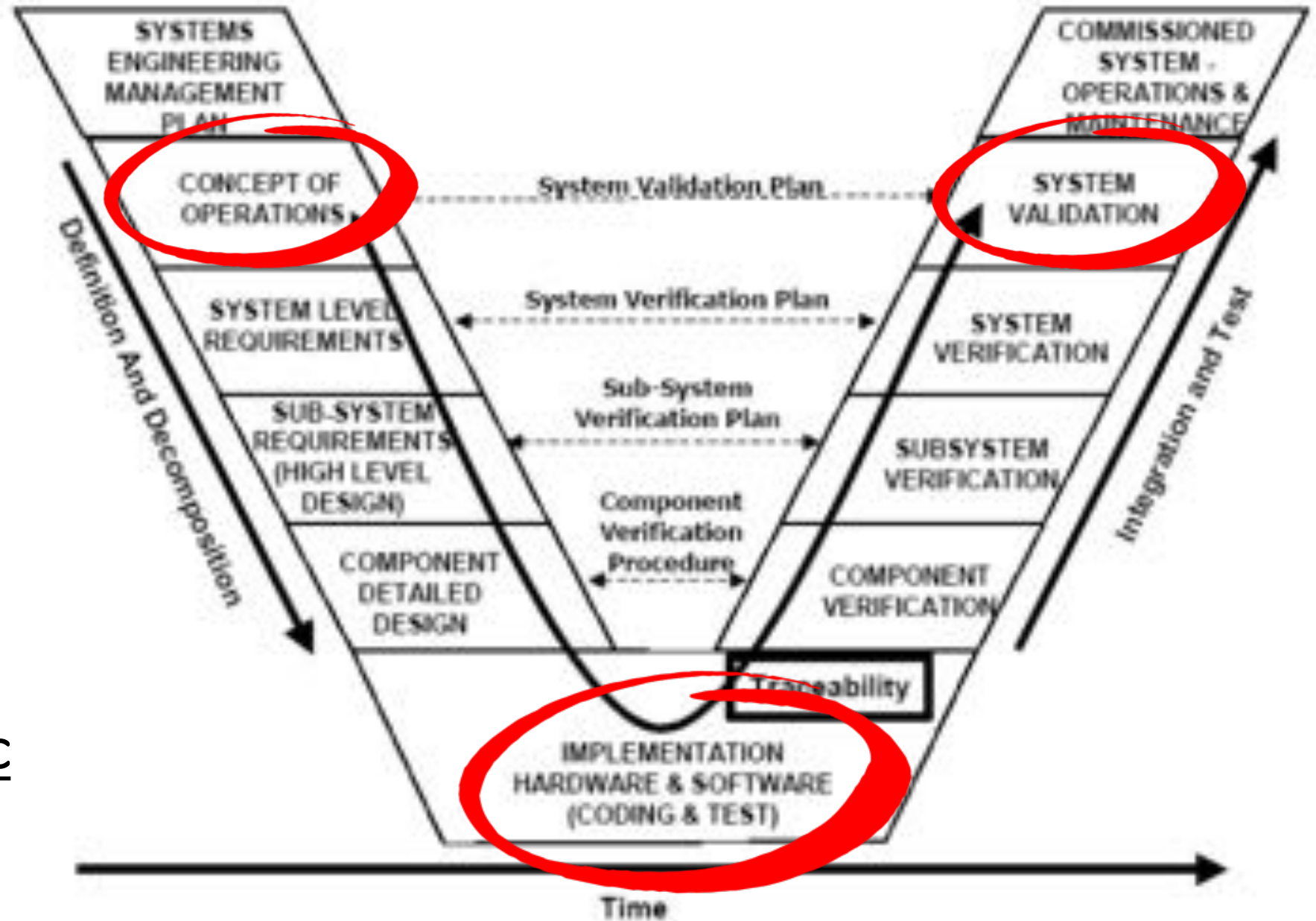
- What you wish to purchase
- The characteristics and functions you most value, *in the order you value them*
- What is required versus what is optional
- Clear vendor requirements
 - In the RFP process itself: how to respond
 - For the final product being purchased: detailed enough to be testable (use cases)

Resource: [CTAA brief on Data Interoperability and Rights](#)

Systems Engineering

Really nothing to be afraid of

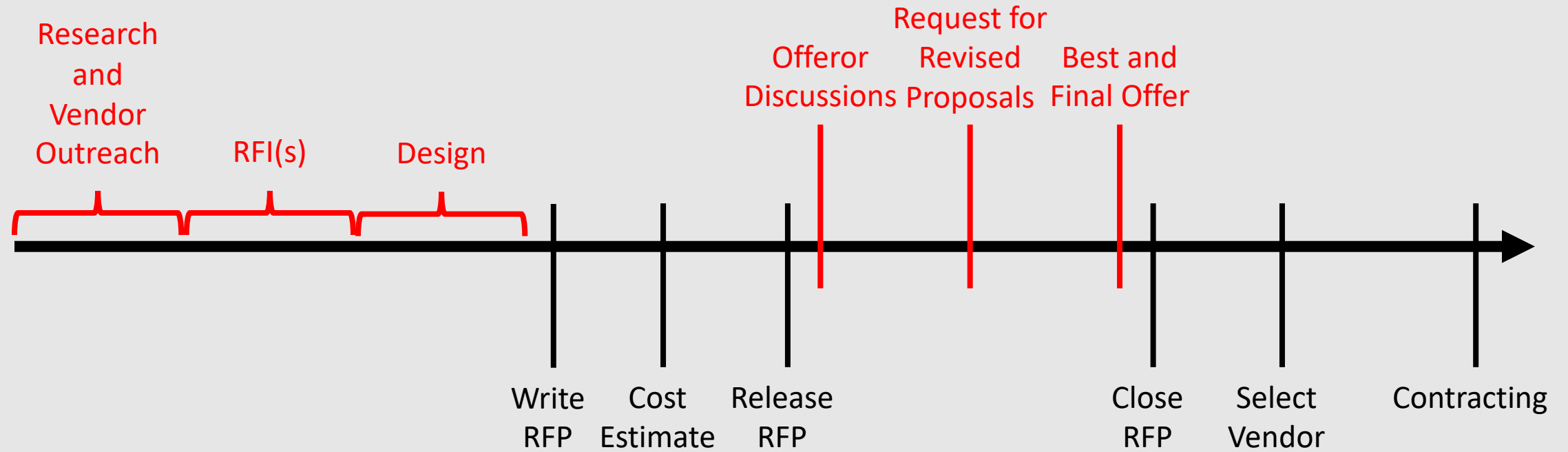
Validation & testing becomes a central organizing principal when attached to payment. Be specific and as objective as possible.



Keep your RFP focused on what You want

- Do you want to encourage more responses?
New actors? Smaller players?
- Ask what boilerplate hoops can you strip out
- What can be pushed to a later stage?
- Make your priorities clear to your procurement specialist
- Have your scoring criteria reflect what you most value

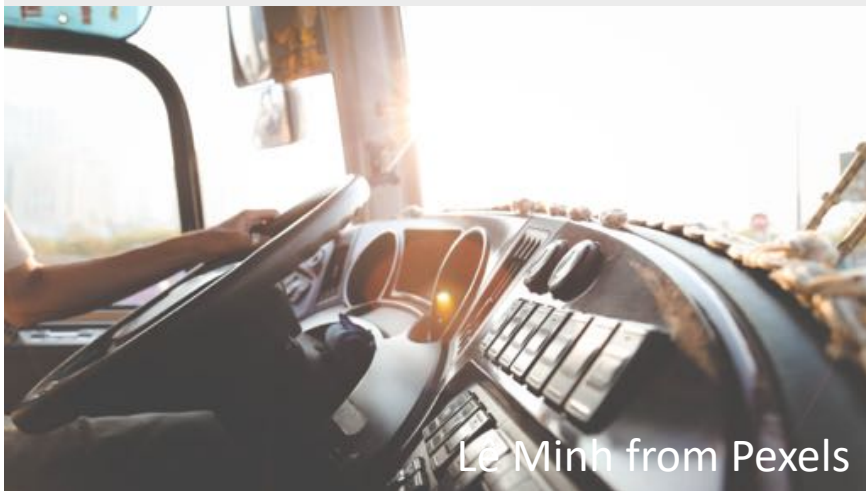
RFPs as Engines for Learning



A strong RFP supports the final decision

- Information will be provided on your terms
 - Consistent presentation
 - Comparable to other proposers
 - Template Excel file may help
- It will provide clear information on:
 - Functions
 - Set-up and training
 - Ability to tailor the product/reports to your system
 - Data storage and ownership
 - Warranties, customer service
 - SaaS: service level agreements, uptime history
- It will enable you to compare costs
 - Initial purchase
 - Ongoing maintenance

Procurement Challenges



Le Minh from Pexels

- What you want to purchase may not be available
 - What trade-offs are you willing to make?
 - What changes can you make to internal processes?
- Keeping an open mind about possible solutions
- Focusing on the functionality you need and can sustain
- Other technology upgrades may be required
- Creating an Independent Cost Estimate for a unique or cutting edge purchase
- Deciding the IT capacity to maintain in-house versus to the capacity to purchase from vendors



Questions

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Thanks to
Suzanne O'Neill