

GoTriangle
Operations & Finance Committee
July 26, 2017 10:30 am-11:45 am

I. Call to Order and Adoption of Agenda

ACTION REQUESTED: Adopt agenda.

(1 minute Ed Harrison)

II. Draft Minutes - June 7, 2017

ACTION REQUESTED: Approve minutes.

(1 minute Michelle Dawson)

III. Enterprise Resource Planning (ERP) Phase 1 - Financial Management System
Contract Award

ACTION REQUESTED: Recommend that the Board award a contract to Crowe Horwath LLP for ERP Phase 1 - Financial Management System Contract for FY18, with a maximum dollar amount of \$880,000 and authorize the GM to execute the contract consistent with those terms.

(15 minutes Sandra Freeman)

ERP Award Justification

IV. Vanpool Service Delivery Options

(15 minutes John Tallmadge)

Vanpool Presentation

V. On-Demand Project - Testing a New Service Model in RTP Area

(15 minutes John Tallmadge)

On-Demand Pilot Presentation

VI. Adjournment

(Ed Harrison)

**GoTriangle Board of Trustees
Operations & Finance Committee Meeting Minutes
June 7, 2017**

Board Room, The Plaza, 4600 Emperor Blvd., Suite 100
Durham, NC

Committee Members Present:

William V. "Bill" Bell

Barry Jacobs

Ed Harrison, Committee Chair

Ellen Reckhow

Sig Hutchinson (arr. 10:52 am)

Committee Chair Ed Harrison called the meeting to order at 10:38 am.

I. Adoption of Agenda

Action: On motion by Reckhow and second by B. Jacobs the agenda was adopted. The motion was carried unanimously.

II. Approval of Minutes

Action: On motion by Reckhow and second by B. Jacobs the Committee approved the minutes of the May 24, 2017, meeting. The motion was carried unanimously.

III. FY18 Proposed Budget

A. GoTriangle Budget Ordinances

Harriet Lyons presented changes to the proposed budget since the last meeting: an increase of \$100,000 to investment income and a decrease of \$125,000 in spending from various departments. She stated proposed revenue for FY18 is now estimated at \$32.5 million with proposed expenditures of \$33.2 million. Lyons added that the final budget ordinances will be presented at the Board meeting.

B. Triangle Tax District - Wake Budget Ordinances

Ren Wiles reviewed the proposed FY18 budget and ordinances for Wake Transit. He stated that there are no changes anticipated.

Action: On motion by Reckhow and second by Bell the Committee voted to recommend Board adoption of the FY 2018 Triangle Tax District – Wake Operating Fund ordinance. The motion was carried unanimously.

Action: On motion by Reckhow and second by Bell the Committee voted to recommend Board adoption of the FY 2018 Triangle Tax District – Wake Capital Fund ordinance. The motion was carried unanimously.

IV. **Wake Transit Financial Policies & Guidelines**

Ren Wiles presented the financial policies and guidelines being proposed for the Wake Transit Plan. He stated that the operating fund is intended to have financial reserves at the end of the year of 25% of expected revenues from the next year's sales tax. The capital fund will build over several years to 5% of the 10-year balance. He stated these amounts will be a cushion should there be economic downturns, but also indicators of good financial management when rated by a bond rating agency.

Reckhow asked why there is not a similar policy for the D-O LRT project. Sandra Freeman stated that a financial policy has been drafted for the D-O LRT project; however, the policy needs to be compared to the current financial model to assure they are compatible.

Hutchinson arrived.

Action: On motion by Hutchinson and second by Reckhow the Committee voted to recommend Board adoption of the Wake Transit Financial Policies and Guidelines. The motion was carried unanimously.

V. **Wake Transit FY18 Work Plan**

Erik Landfried, David Powe and Ren Wiles review the contents of the Wake Transit FY18 Work Plan. Their presentation is attached and hereby made a part of these minutes.

Landfried explained that the work plan would be adopted by the GoTriangle Board of Trustees as well as CAMPO's Board. He added that this year the dates were compressed, but in future years the process should begin in November. Landfried said if adopted, the first output from the Plan would be new bus service from GoTriangle, GoRaleigh, GoCary and Wake County Tracs. Work also will be on capital projects.

David Powe explained the public input process and reviewed the comments received. He stated that a "Frequently Asked Questions" (FAQs) section will be added to the Wake Transit website that will address all the comments received. He said for FY19 staff will work to improve the public input process by trying to reach more people.

Landfried then reviewed operating and capital budget changes to the Plan since the last presentation to the Committee. Reckhow asked that the Committee be kept apprised of the removal of 4.3 transit plan administrative employees from the operating budget.

Ren Wiles presented the FY18 budget. Landfried discussed the specific operating and capital expenditures and projects which make up the plan.

Action: On motion by Hutchinson and second by Reckhow the Committee voted to recommend Board adoption of the FY18 Wake Transit Work Plan. The motion was carried unanimously.

VI. Approval of First Amendment to ILA for Administrative Distribution of Wake County \$7 Vehicle Registration Tax

Shelley Blake presented an amendment to the Interlocal Agreement (ILA) for the collection of the \$7 vehicle registration tax. She said that any municipality requesting money under the Wake Transit Plan will be required to be a party to the ILA. This amendments adds the Town of Apex, and future amendments would add other municipalities who did not originally sign.

Action: On motion by Reckhow and second by Hutchinson the Committee voted to recommend that the Board authorize the General Manager to execute the First Amendment to the Interlocal Agreement (ILA) governing the administrative distribution of funds from the \$7 Wake County vehicle registration tax. The motion was carried unanimously.

VII. Capital Budget Costs for D-O LRT Project Office

Gary Tober requested that the Committee recommend the Board authorize the General Manager to contract for the purchase and installation office furniture and networking equipment as part of our D-O LRT project office relocation. The request includes \$275,000 for systems technology and \$398,000 for furnishings and relocation for a total of \$673,530. He added that the landlord will contribute \$238,000 for ceiling tiles, moving walls and carpeting.

Action: On motion by Reckhow and second by Bell the Committee voted to recommend that the Board authorize the General Manager to execute a contract for the purchase and installation of office furniture and network equipment as part of the D-O LRT Project office relocation for a total of \$673,530. The motion was carried unanimously.

VIII. MOU for Sub-Allocation of FTA Formula Grants to Raleigh Urbanized Area

Karen Porter presented a proposed Memorandum of Understanding (MOU) between CAMPO, GoTriangle, the City of Raleigh, Town of Cary and Wake County that memorializes the current and past process and methodology for the annual distribution of the FTA Raleigh Urbanized area formula grants. She stated this is the first time a MOU has been signed. The term is five (5) years.

Action: On motion by Reckhow and second by B. Jacobs the Committee voted to recommend Board approval of the Memorandum of Understanding (MOU) for the

Sub-Allocation of FTA Formula Grants to the Raleigh Urbanized Area. The motion was carried unanimously.

IX. Hillsborough Park-and-Ride Property Acquisition

Gary Tober requested that the Committee recommend Board authorization for the General Manager to purchase property in Hillsborough for a park-and-ride lot. He stated the property is a wooded lot near highway 70 and Miller Road. Tober explained that GoTriangle was asked to vacate its previous park-and-ride location and has been using spaces at Durham Technical Community College. He said the property has been appraised and review appraisals are being done, consistent with FTA regulations. He said the budget is \$130,000 and should be sufficient for the purchase of the property. Tober added that the sellers are willing and there would be no displacements nor need for condemnation to acquire the property.

Action: On motion by Bell and second by Reckhow the Committee voted to recommend that the Board authorize the General Manager to purchase property identified for the Hillsborough Park-and-Ride for an amount not to exceed \$130,000. The motion was carried unanimously.

X. Operating & Capital Agreements

General Counsel Blake explained that the Wake County Transit Plan will require an agreement for every project moving forward. She presented a chart showing the capital and operations projects included in the FY18 Wake Transit Work Plan which would have agreements. The draft operating agreement is being reviewed by all of the attorneys, and will be the template for all projects moving forward. Exhibit A would attach to the agreement and provides details on the project: budget, scope, implementation date and deliverables.

Reckhow asked if executed agreements would be included in the General Manager's monthly report to the Board of contracts approved, and include the parties, the project and the amount. Blake stated yes.

Blake explained that a special operating agreement would have a term different than the template. It would be considered a general agreement if it uses the exact template.

XI. Policy Statement

General Manager Mann reported that GoTriangle is leading a regional grant application under FTA's low emission no emission grant program to offset the cost of electric vehicles which we would test. The partners include Chapel Hill Transit, GoDurham, GoRaleigh and GoCary. A consultant is drafting the grant application. He stated that a policy statement could strengthen the application. The Board-adopted statement would direct GoTriangle to evaluate opportunities to convert our fleet over time to lower emissions or no emission vehicles.

B. Jacobs asked that staff make a differentiation between vacant and undeveloped property in presentations. He suggested that GoTriangle develop a policy about development of wooded properties if such a policy does not exist.

XI. Adjournment

Action: On motion by B. Jacobs and second by Reckhow the meeting was adjourned at 11:49 am.

Ed Harrison, Committee Chair

Attest:

Michelle C. Dawson, CMC
Clerk to the Board of Trustees

Draft

MEMORANDUM

TO: Operations & Finance Committee
FROM: Finance and Administrative Services
DATE: July 17, 2017
SUBJECT: **Enterprise Resource Planning (ERP) Phase 1 - Financial Management System Contract Award**

Strategic Objective or Initiative Supported

This item relates to the initiative to Implement Enterprise Resource Planning (ERP) System.

Action Requested

Staff requests that the Committee recommend to the Board the award of a contract to Crowe Horwath LLP for Enterprise Resource Planning (ERP) Phase 1 - Financial Management System Contract for Fiscal Year 2018, with a maximum dollar amount of \$880,000 and authorize the General Manager to execute the contract consistent with those terms.

Background and Purpose

Staff was task to look at our present financial system to see if it could support GoTriangle current and future operations, along with supporting the Durham, Orange, and Wake plans. Upon further review it was determined that in order to support these tasks, staff would need a new Enterprise Resource Planning (ERP) system. Staff was then instructed to prepare an RFP to find a vendor that will be able to provide a system to support our future ERP needs. Staff believed that Crowe Horwath LLP Microsoft Dynamics AX software is the system that will support our Strategic initiative.

Financial Impact

The total cost of this project is a one-time implementation cost of \$880,000. The cost of this project is split between the following revenue sources **50% GoTriangle, 25% Durham-Orange, and 25% Wake County** for FY18 budget year.

Attachments

- Award Justification

Staff Contact(s)

- Sandra Freeman, (919) 485-7415, sfreeman@gotriangle.org
- Mitchell Lodge, (919) 485-7550, mlodge@gotriangle.org



1 ENTERPRISE RESOURCE PLANNING (ERP) PHASE 1 - FINANCIAL MANAGEMENT SYSTEM

Award Justification

Mitchell Lodge – Manager
Finance & Accounting Systems

6/7/17

ERP Phase 1



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1 ENTERPRISE RESOURCE PLANNING (ERP) PHASE 1 - FINANCIAL MANAGEMENT SYSTEM

1.1 SITUATION ANALYSIS

The ERP project's objective is to implement a Best-of-Class ERP system. The critical goal of the ERP project is to provide business process re-engineering opportunities to achieve more effective and efficient business processes throughout the organization. GoTriangle's current financial management system has become outdated and is ineffective in support of current business processes at GoTriangle including bus fleet management and its performance will further diminish due to the future rail system addition and route expansions.

Over the years, processes and functionalities have evolved at GoTriangle to support other business functionality with the help of many additional "make-do" systems and other external databases. Many of the Authority's current accounting systems are challenged to support business practices. Below are some of the primary issues that exist across all functional areas:

- Lack of departmental User Interface (UI) that makes it difficult for users outside of the Finance Department to use the system.
- Current system was built on Cobal infrastructure and data.
- Lack of integrated systems that feed data seamlessly to/from FundWare Financial system.
- Current system does not adequately allow for needed business work-flows for performing several functions between departments. For example, the budget process is very cumbersome.
- Lack of functionality in various FundWare modules.
- Inability of current system to keep up with business growth.
- Minimal reporting capabilities.
- Lack of self-service tools for employees.
- Lack of various administrative and management oversight tools available in the system.
- Lack of adequate outside support and resources for the system.

2 PROPOSAL

GoTriangle's overall goal is to implement a financial (government/fund) accounting software system (the ERP Financial Management System) that will assist in the Authority's ability to accurately, efficiently and cost-effectively process its financial, accounting and operational transactions.



2.1 Phased Roll Out by Functional Area/Department

2.1.1 Phase 1 – Financial Management System(s)

- Accounting (General Ledger, AP, AR, and Reporting)
- HR integration – Currently using Epicor HCM
- Payroll
- Budgeting
- Fixed Assets (Parts, Inventory, Reporting)
- Procurement/Purchasing
- Tax Collection
- Ticket Sales
- Contract System Integration
- Document Control

2.1.2 Phase 2 – Customer Relation(s) Management

- Marketing
- Customer Service
- Operations (Maintenance)
- Operations (Facilities)

2.1.3 Phase 3 – Project Management

- Project(s)
- Planning
- Engineering

2.2 BENEFITS

The following lists some of the major benefits that GoTriangle is looking for in an integrated ERP system(s):

- Eliminate standalone business processing systems.
- Eliminate duplicate efforts and redundant data entry processes.
- Ensure compliance with all applicable legal standards.
- Ensure security of confidential information and records.
- Implement a flexible system that can respond to future ERP phases, and changing business needs.
- Improve workflow processes and implement industry best practices.
- Increase information analysis capabilities that support enhanced decision-making capabilities.
- Increase our business partners, the public, and our contractor access to GoTriangle.
- Provide a centralized approach to business processing.
- Provide an open architecture database environment that allows easy import, export, identification, searching, input, retrieval, and linking of current data to other systems.
- Provide centralized control of all forms of electronic and other documents.
- Provide complete integration between systems and processes.



2.3 Summary list of application replacements/integration

System	Platform	Functional Area	Module
Blackbaud Fundware	Replace	Finance – (Government/Fund Accounting)	General Ledger-Project/Grant
Blackbaud Fundware	Replace	Finance – (Government/Fund Accounting)	Payroll/Personnel
Blackbaud Fundware	Replace	Finance – (Government/Fund Accounting)	Accounts Payable/Purchase Order
Blackbaud Fundware	Replace	Finance – (Government/Fund Accounting)	Report Manager
Blackbaud Fundware	Replace	Finance – (Government/Fund Accounting)	Financial Institutions
Epicor HCM 5.10 (New)	Integrate	Human Resources	Employee Self-service (ESS)
Epicor HCM 5.10 (New)	Integrate	Human Resources	Candidate Self-service (CSS) - Applicant Tracking
Epicor HCM 5.10 (New)	Integrate	Human Resources	Management Self-service (MSS)
NetTime Solutions	Integrate	Payroll	Time entry system/clocks
CobbleStone (New)	Integrate	Admin/Legal	Contract Management

3 SELECTION PROCESS

3.1 Selection Committee

Mitchell Lodge – Project Manager
Maurice McGhee – Project Administrator
John McCune - IT
Ren Wiles – General Ledger/Accounting
Bobbie Herald – Accounts Payable/ PO
Deirdre Walker – Grant/Project
Harriet Lyons – Budget/Reporting
Priscilla Bond – A/R
Majid Mahomed – IT Manager
Marisol Suarez - Payroll

3.2 Criterion

Vendors were evaluated on the following basis.

Criterion	Weight
Understanding Scope of Work	20%
Personnel Experience and Expertise	20%
Technical and Functional Requirements	15%
Project Management Plan	10%
References from Previous Clients	5%
Cost	30%
Total	100%

3.3 Proposers

The evaluation committee received five proposals and the evaluation committee shortlisted three firms, which are listed below.

	Crowe Horwath	AccuFund, Inc	Century Link
*Average Rating Score	3.006	2.822	2.103
Rank	1	2	3

**The Average Rating Score includes the technical criterion and cost proposal. The average rating are based on a scale of 1 thru 5, five (5) being the highest.*

4 ALTERNATIVES

Continue to operate in the present manner with outdated technologies while anticipating increased expenses primarily due to increasing customizations of outdated applications.

5 RECOMENDATION

5.1 Recommendation

The ERP Phase 1 selection committee recommend awarding the contract to proposer Crowe Horwath LLP – Microsoft Dynamics AX software with a final negotiated one-time implementation cost of \$880,000.



MEMORANDUM

TO: GoTriangle Operations & Finance Committee
FROM: Regional Services Development
DATE: July 19, 2017
SUBJECT: **Vanpool Service Delivery Options**

Strategic Objective or Initiative Supported

This item relates to Initiative: Develop vanpool business plan (including strategies to improve fleet management, billing, reporting).

Action Requested

Receive this presentation and provide comments and direction.

Background and Purpose

Customer ridership on vanpool services has been declining since 2009, particularly in the past two years when fuel prices have fallen significantly. As the number of vanpools in operation has declined, the operating subsidy per van has increased because some of the program costs are fixed and thus are spread across fewer vanpools.

As vanpool demand has fallen, GoTriangle has had excess vehicles in the fleet, which still have costs even when not in service. When demand increased rapidly in 2006, 2008, and 2009, GoTriangle had difficulty supplying vehicles to meet the demand.

Our relevant strategic objectives are to increase the number of customers using vanpool services and to maintain cost-effectiveness. While we have always managed this service in-house, many agencies contract the program administration to a third-party. Staff has been developing a Request for Proposals to evaluate whether a new service delivery strategy can meet our objectives.

Financial Impact

The cost of contracting out the vanpool program administration will be one of the criteria against which proposals are evaluated. These costs will be compared to the net costs of our current operation. The vanpool operation also generates federal formula grant revenues for GoTriangle. The potential changes to these revenues will also be part of the evaluation.

Attachments

- Presentation Slides

Staff Contacts

- John Tallmadge, 919.485.7430, jtallmadge@gotriangle.org
- Vanessa Battle, 919.485.7662, vbattle@gotriangle.org



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Vanpool Service Delivery Options

O&F Committee

July 26, 2017

Vanpool Service



Current Delivery

We lease vans to a driver and group of riders

One end of commute must be in 3-county service area

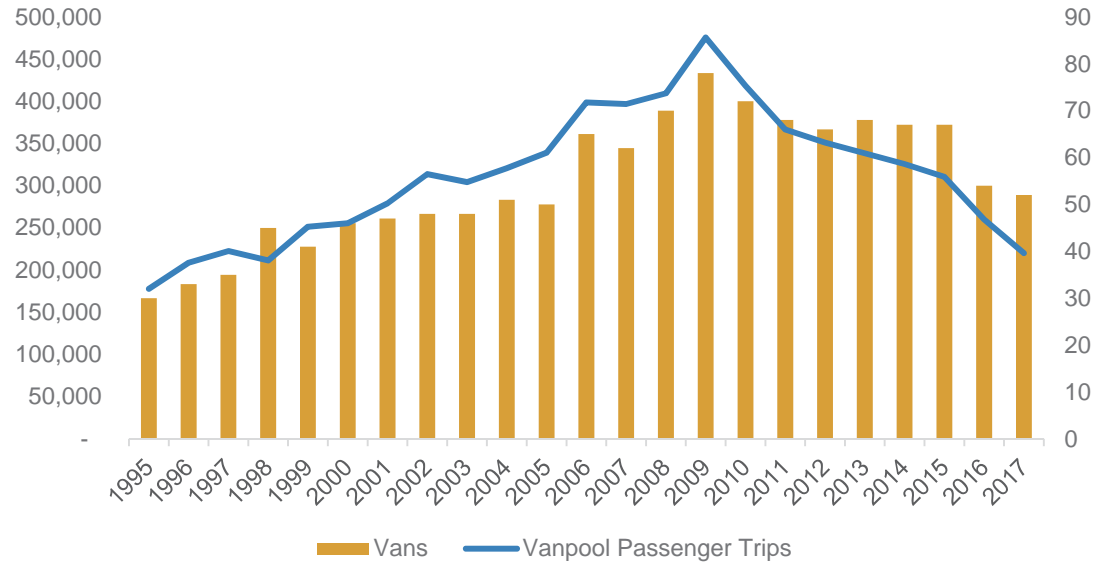
Program is completely in-house

- GoTriangle owns and maintains vehicles (7- and 12-passenger vans)
- GoTriangle provides insurance
- GoTriangle invoices drivers and employers and collects payments
- GoTriangle handles all sales and marketing
- GoTriangle reports to National Transit Database

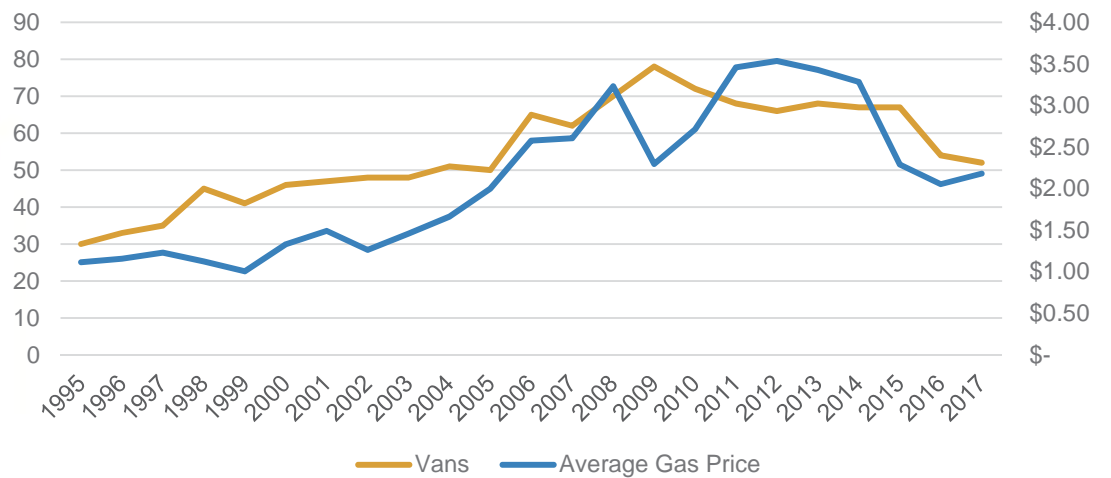
1 Vanpool Manager & 2 Mechanics

**Ridership
has been in
decline
along with
gas prices**

Vanpool Customer Trends
1995-2017

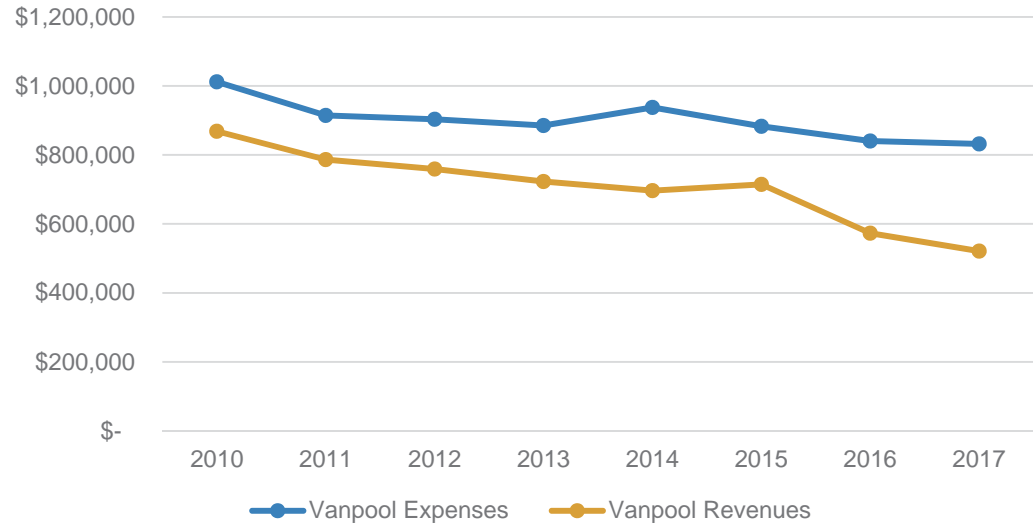


Vanpool Comparison with Average Gas Price

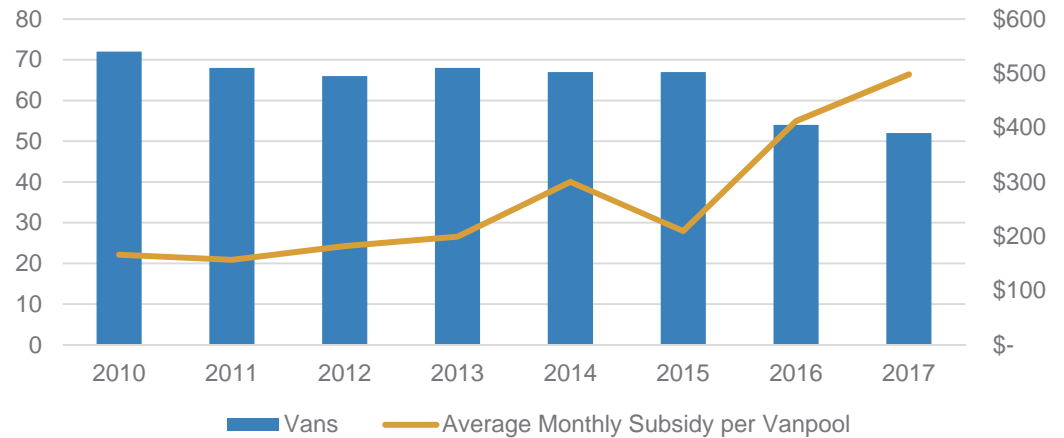


Monthly Subsidies per Van Increase as Number of Vans Decline

Vanpool Expense and Revenue Trends



Monthly Subsidy per Vanpool (Before Federal Formula Grant Revenues)



Vanpool Program Objectives and Strategies

Increase number of customers and vanpools in service

- Dedicate more resources to sales/recruitment
- Promote greater subsidies at target employers

Stabilize subsidy per van at a level below anticipated federal grant revenues

- Create a better match of fleet to customer demand
- Adjust prices to target level of subsidy per van

Maintain high level of customer satisfaction

Vanpool Service Delivery Options

In-House

- Consider adding a staff person to increase recruitment / sales
- Set vanpool fare subsidy policy

Third-Party

- Provides all vehicles, insurance, maintenance, and administration
- GoTriangle can choose to subsidize vanpool prices
- GoTriangle continues to receive federal formula grant revenues
- GoTriangle handles some or all of marketing responsibilities

Hybrid

- GoTriangle handles base fleet in-house and uses third-party for expansion

Schedule for Considering Third-Party Service Delivery

Issue RFP	July/Aug
Review Proposals	Sept
O&F Recommendation	Sept/Oct
Board Action	Oct/Nov
Earliest Transition	Dec/Jan

MEMORANDUM

TO: GoTriangle Operations & Finance Committee
FROM: Regional Services Development
DATE: July 19, 2017
SUBJECT: **On-Demand Project - Testing a New Service Model in RTP Area**

Strategic Objective or Initiative Supported

This item relates to Initiative: Promote first and last-mile access (e.g., on-demand shuttle pilot project in RTP).

Action Requested

Staff requests that the Committee receive the presentation and provide comments and direction.

Background and Purpose

The On-Demand Project is a two year pilot and demonstration that will test innovative technologies to provide transportation service in and around the Research Triangle Park (RTP). The On-Demand Project's goal is to attract new transit riders to GoTriangle by enhancing transit service within the park to on demand, instead of the current fixed schedule, as well as making service available whenever GoTriangle provides service to the Regional Transportation Center (RTC), an improvement over the current peak-period only service.

After researching various service models and technologies, we have entered into a pilot agreement with TransLoc to test their OnDemand platform with our own vehicles and operators to substitute for the four current RTP Shuttles. The software will dispatch GoTriangle vehicles when requested, taking customers on a more direct route to their destination. Testing of software by GoTriangle has begun and will continue through October. If the resulting service provides a satisfactory customer experience, GoTriangle will begin demonstrating the service with customers of Shuttle 42 (primarily IBM), starting in October. As we learn from experience about the opportunities and limitations of this technology and service delivery model, we plan to expand the service to the rest of RTP and its immediate environs over the coming year.

Financial Impact

The project is funded by a Congestion Mitigation Air Quality (CMAQ) Grant administered by NCDOT for up to \$150,000 which is 80% federally funded or \$135,000, 10% state funded, or \$15,000. GoTriangle provides a 10% match of \$15,000. Since we are not adding service, the expenses will be associated with software licensing, marketing and customer information, and potentially subsidies for ride-hailing services.

Attachments

- Presentation Slides

Staff Contacts

- John Tallmadge, 919-485-7430, jtallmadge@gotriangle.org
- Maureen Devlin, 919-485-7507, mdevlin@gotriangle.org



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On-Demand Project Testing a New Service Model in RTP Area

P&L Committee

July 26, 2017

On-Demand Project

Presentation Overview



Problem Statement
Current Service
The RTP Area
Grant Award
Proposed Service
On-Demand Phases
 Pilot
 Demonstration

Shuttle Service Today

Problem Statement

RTP Shuttles are lightly used, and limit capacity to serve higher demand areas.

All Day

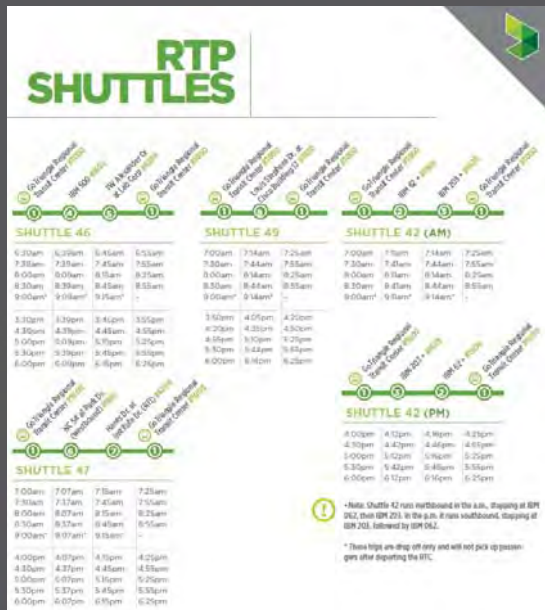
AM and PM Peak



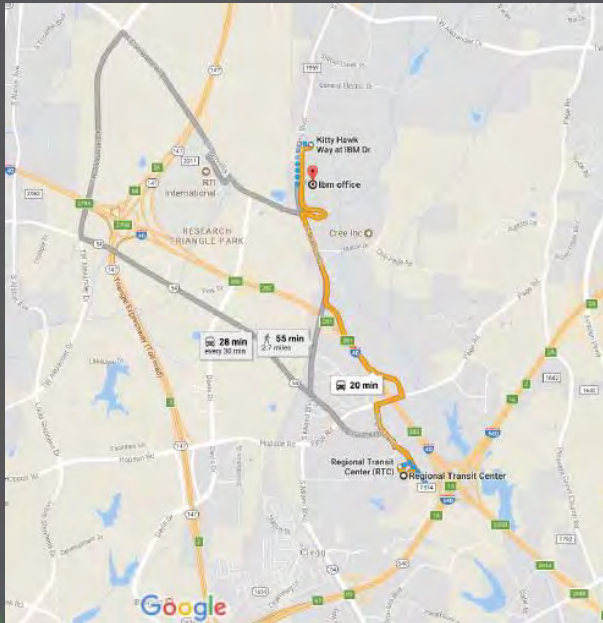
Current Service

Some Numbers

- Currently requires 4 shuttles on a fixed route
- Service is a “last mile” connection, requires 1 transfer at RTC
- Service is appx. 6 hours only, AM and PM peak
- Shuttle runs experience delays due to congestion
- Passengers’ distance from home is increased
- Average daily boardings <100 people
- Cost per trip averages over \$20



Serving The Park



RTP Area

Challenges:

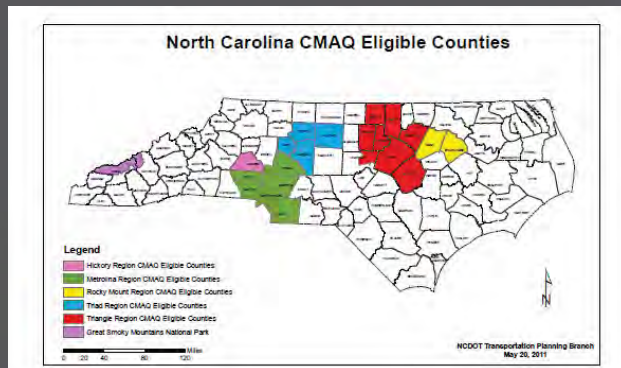
- Passenger - Shuttles only during AM/PM peak.
Limits employees who have non-traditional schedules.
- GoTriangle - Service is expensive.
Uses resources that could serve higher-demand areas
- Employers - Provide free parking.
Create car-oriented travel environment.

Opportunities:

- Passenger → Considers congestion, commute costs, environmental impacts, and limited free time.
- GoTriangle → Service stops are often within ¼ mile of employment centers.
- Employers → Want to provide attractive perks, to hire and retain talent.

Solving the Problem: Can we convert more riders to transit with innovative services?

Grant Award From CMAQ



Award and Limitations

Award = \$150,000 to test innovations in on-demand technology to provide transportation services

Award Limitations:

- Drivers must be Drug and Alcohol Tested
- Vehicles must be ADA accessible
- Passengers must be able to access with only a telephone

Goal: Increased ridership to reduce VMT

Reimagine Project



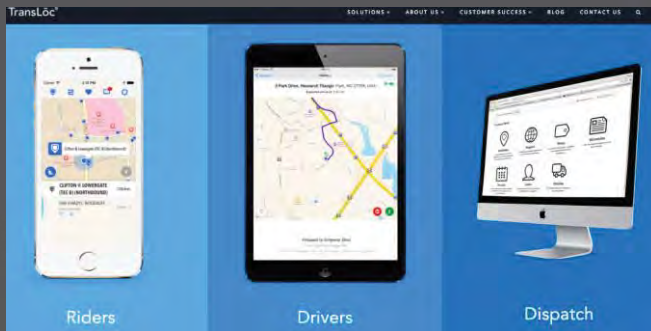
Test On-Demand Market

1. GoTriangle - Releases RFI for On-Demand Technology and/or Transportation
2. Market Responds (4 total)
 - 3 software only
 - 1 software/service (MV operating in Cary)
- TransLoc responds for software only
3. TransLoc follows up with an offer
“Free trial of On-Demand Software”

TransLoc’s Goal: Project is in backyard and wants to have a White Paper opportunity

Project Reimagined

Rescope Project



On-Demand Service designed to leveraging strengths:

Technology by license,
testing TransLoc for free for 90 days.

Transportation by GoTriangle.

*Efficiency gains: GoTriangle will run buses
when needed with real time information,
from customers.*

On-Demand Project

On-Demand Service

All Day



All Day

when ordered by Customer



On-Demand Project



Phases

1. Test internally – July to September, 2017
If first month tests well,
begin marketing On-Demand Service
2. Outreach and Education – September, 2017
3. Demonstrate On Demand service instead of running Shuttle 42– October to March, 2018
4. Evaluate
Consider serving entire RTP area
Consider serving new areas

On-Demand Project



Questions?