

# Response to National Cooperative Purchasing Alliance (NCPA) RFP for Transportation Software Solicitation #:06-19

## **NCPA Region 14 Education Service Center**

Due Date and Time: March 19, 2019 at 2:00 PM CST



## ECOLANE'S COMMITMENT TO ENVIRONMENTALLY SUSTAINABLE SOLUTIONS

Ecolane DRT reduces vehicles needed by more efficiently scheduling trips. Some environmentally friendly statistics from our recent implementations:

- Reduction in vehicles needed from 18 to 13 due to more efficient scheduling
- Reduction in annual CO2 emissions of 360,390 lbs. per vehicle per year (source: [www.Terrapass.com](http://www.Terrapass.com))
- A paperless manifest system that resulted in a decrease of 24,450 pieces of paper per year in Arlington, TX. Each Ecolane system has experienced similar declines in paper annually based on the number of vehicles in use at the system
- Ecolane purchases only recycled, wood furniture for our business development office workspace

Also, and where possible, Ecolane tries to use recycled products. Ecolane is committed to reducing carbon emissions and the amount of paper that is wasted in paratransit scheduling annually. The binders for this proposal are supplied by Earth Binder and are 100% recycled chipboard and 100% recycled paper. Earth Binders are best handled by supporting and lifting with your hand under the back cover and not the spine of the binder.



REDUCE, REUSE, RECYCLE

Contact: Ryan J. Larsen  
Senior Vice President  
940 West Valley Road, Suite 1400  
Wayne, PA 19087  
Phone: 610-312-0033 Ext. 130  
Cell: 712-249-6156  
Fax: 712-764-6101  
Email: [ryan.larsen@ecolane.com](mailto:ryan.larsen@ecolane.com)

Additional information about Ecolane's solutions is available at [www.ecolane.com](http://www.ecolane.com)

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# 1 Letter of Transmittal

03/19/2019

Region 14 Education Service Center  
1850 Highway 351  
Abilene, TX 79601

RE: National Cooperative Purchasing Alliance Request for Proposal for Transportation Software Solicitation Number: 06-19.

Ecolane is pleased to respond to National Cooperative Purchasing Alliance (NCPA) RFP for Transportation Software Solicitation #:06-19. Ecolane is proposing our Demand Response Technology (DRT) automated scheduling and Touch Screen Mobile Data Terminal (MDT) software. The proposed cost and technical information provided in this submission are valid for 120 days.

Ecolane offers a complete line of products and services designed to enable transportation managers to serve their communities and clientele better. Our innovative solutions allow your dispatchers and drivers to focus on providing reliable, efficient service while leaving the complex logistics of demand-responsive software and systems to our intuitive routing and management algorithms. It also allows your passengers the flexibility they want in today's "mobile" world by giving them control over their schedules. Ecolane software, which is 100% web-based, is similar to commercial "apps" like Uber and Lyft, but with a ridesharing component that provides measurable productivity improvements via dynamic scheduling, all in real time.

Ecolane was established in 2002 initially overseas with an idea to create software specifically for dynamic carpools that had the ability of "matching" drivers and riders automatically, based on the trip details. In 2008, Ecolane established itself as a corporation in the State of Delaware and continued to grow and improve its solution and services. One thing that has stayed constant is the basics of our booking, routing, and scheduling algorithms. Even today, Ecolane DRT uses the same philosophy of matching trips that are going from locations in proximity to each other to destinations in the same direction at the same time. With this philosophy, we help transit agencies to **Do More, Take Control, and Achieve Goals** that they have set for themselves. We are a market leader, providing solutions to well over 170+ customers around the globe.

What kind of improvements could your agency expect when choosing Ecolane? Ecolane customers see an average **productivity increase of 44% on the day of service from the previous software solution**. Competing software packages might deliver minimal productivity increases **on the day prior to** service delivery, but it ends there. What's the difference, you ask? The Ecolane DRT algorithms backfill schedules with new trips or rescheduled trips after daily events occur, such as cancellations, no-shows, vehicle breakdowns, etc. In other words, Ecolane's DRT operates in response to real-world conditions that agencies face. By optimizing schedules in **real-time**, increases in productivity metrics such as rides per hour (RPH) on the day of service happen in a manner not achievable by any other software. How do I know this information? In my previous position as President of IntelliRide, a global mobility management provider, the oversight of transit operations was part of my job responsibility. At that time, we used all the major software packages, and none were capable of automated scheduling resulting in productivity increases on the day of service... not one...except for Ecolane.

We also understand that providing safe, reliable, and high quality, on-demand transportation, and community access in the face of these headwinds is asking both government and agencies to **do more with less**. This is why we are prepared to help agencies "weather the storm" that is greatly

expected as baby boomers retire and demand more from transit agencies than ever before with regard to technology and customer service.

Finding a partner with the expertise, experience, scale, technology, and vision to overcome these challenges has become vital. Ecolane's goal is to deliver solutions to replace transit agencies' legacy systems with modern, industry changing and next-generation transit technology. The list below contains some of our next generation technology solutions:

- **A 100% web-based solution, hosted by Ecolane in a HIPAA compliant** data center in Baltimore, MD that was disaster tested by Hurricane Sandy and is backed up with a redundant center located in Houston, TX; which was recently disaster tested by Hurricane Harvey
- **Quick and intuitive passenger and reservation data management** with the ability to take same day reservations using the best same day optimization algorithm in the industry
- **Continual optimization of trips in large systems over 100+ vehicles, reducing needed drivers,** vehicle miles, time, and costs thus saving your agency time and money to create a new Mobility Paradigm for all APTA transit agency members to emulate
- An easy-to-use reservations entry screen, recognizing the customer name and delivering **routing to the least costly provider and vehicle** enabling better-coordinated transportation and shared trips
- A proven solution in urban and rural environments and for different service types, such as First and Last Mile Solutions, Mobility as a Service (MaaS), Microtransit, and Mobility on Demand (MOD) transit as seen at San Joaquin RTD, Stockton California
- Complete, **electronic manifests and AVL tracking** with the Ecolane Touch Screen MDT
- An industry leading automated **mobile app for passengers** to book trips and follow the vehicle as it approaches. Check out the video of Arlington Texas using the mobile app in their service at <http://video.ecolane.com/ecolane-mobile-app-user-experience>
- Proven ability to reduce costs by increasing the efficiency of scheduled and delivered transportation
- Quick and intuitive passenger and reservation data management that provides the ability for **one-call, one-click reservations** for any time period in advance, or any other time period that your agency may choose. With Ecolane's advanced scheduling engine, even same day reservations are handled efficiently using the best reservations same day optimization in the industry giving agencies the flexibility to further improve customer satisfaction while ensuring maximum efficiency.
- Newly released **voice scheduling using the Amazon Echo DOT** that allows passengers to book trips by merely talking to Alexa;
- **Self-service** web booking for customers
- Big data reporting information for analytics exportable into Microsoft Excel, Word, PDF, and CSV files, 100% verified by GPS data, with no charges for creating or assisting with ad-hoc reports
- Ability to investigate complaints, no-shows, and other service issues in real-time, thus potentially preventing future problems from occurring
- A customer-focused, talented, experienced Ecolane transit professional staff to support you and your team
- Outstanding and highly responsive customer support

We firmly believe Ecolane is the best platform available that will allow transit agencies such as yours, to leverage the capabilities of modern technology. The transit agencies listed below, along with those listed in Tab 6 References of this response, will gladly provide testimony to the success Ecolane has had in improving client operations throughout the country. Case studies of some of our successful customers listed below can be found here - <https://www.ecolane.com/resources>. We are happy to provide their contact info for you to ask them about us personally upon request.

- Link Transit in Wenatchee, Washington – <http://video.ecolane.com/link-transit-powered-by-ecolane>
- Tillamook County Transportation District, Oregon
- Akron Metro in Akron, Ohio
- Arlington Handitran in Arlington, Texas (a suburb of Dallas)
- Detroit DOT in Detroit, Michigan
- Suburban Transit Network in Bluebell, Pennsylvania ( a suburb of Philadelphia)
- rabbittransit in York, Pennsylvania

We encourage NCPA Region 14 ESC to conduct a thorough due diligence process that verifies the claims made by start-up companies as to their scheduling and dispatch prowess and how it relates to real-time scheduling to an app. A successful solution must be able to schedule in real-time and run extensive reports from a dashboard and through historical trip data. Ecolane's primary goal is to provide solutions to replace transit agencies' legacy systems with modern, industry changing and next-generation transit technology. Ecolane prides itself on being open and a straight shooter when responding to RFPs. You will be able to see how upfront we are when it comes to our solution, including our pricing, in this proposal response. When preparing a proposal response, we try to be cognizant of everything an agency may need for their project in the pricing so that there are no 'hidden fees' that may appear after the contract is signed.

Rex Clark is the Vice President for Ecolane Business Development for your area and will be your account manager. His bio, along with the bios of our Executive team and other directors, can be found here <https://www.ecolane.com/about-ecolane/our-team>. If any questions related to the submission of this RFP should arise, please contact me as the Ecolane executive authorized to commit our company resources to this project.

Sincerely,



**Ryan J. Larsen**  
Senior Vice President

**Ecolane USA, Inc.**  
940 West Valley Road, Suite 1400  
Wayne, PA 19087  
Phone: 610-312-0033 Ext. 130  
Fax: 712-764-6101  
[ryan.larsen@ecolane.com](mailto:ryan.larsen@ecolane.com)

CC: Rex Clark, Vice President of Business Development, 530-383-1414, [rex.clark@ecolane.com](mailto:rex.clark@ecolane.com)



# Response to National Cooperative Purchasing Alliance (NCPA) RFP for Transportation Software Solicitation #: 06-19

## **NCPA Region 14 Education Service Center**

Tab 1 – Master Agreement General Terms and Conditions/ Signature  
Form



# 1 Master Agreement General Terms and Conditions/ Signature Form



# Tab 1 – Master Agreement

## General Terms and Conditions

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- ◆ Customer Support
  - The vendor shall provide timely and accurate technical advice and sales support. The vendor shall respond to such requests within one (1) working day after receipt of the request.
- ◆ Disclosures
  - Respondent affirms that he/she has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with this contract.
  - The respondent affirms that, to the best of his/her knowledge, the offer has been arrived at independently, and is submitted without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this contract.
- ◆ Renewal of Contract
  - Unless otherwise stated, all contracts are for a period of three (3) years with an option to renew for up to two (2) additional one-year terms or any combination of time equally not more than 2 years if agreed to by Region 14 ESC and the vendor.
- ◆ Funding Out Clause
  - Any/all contracts exceeding one (1) year shall include a standard “funding out” clause. A contract for the acquisition, including lease, of real or personal property is a commitment of the entity’s current revenue only, provided the contract contains either or both of the following provisions:
  - Retains to the entity the continuing right to terminate the contract at the expiration of each budget period during the term of the contract and is conditioned on a best efforts attempt by the entity to obtain appropriate funds for payment of the contract.
- ◆ Shipments (if applicable)
  - The awarded vendor shall ship ordered products within seven (7) working days for goods available and within four (4) to six (6) weeks for specialty items after the receipt of the order unless modified. If a product cannot be shipped within that time, the awarded vendor shall notify the entity placing the order as to why the product has not shipped and shall provide an estimated shipping date. At this point the participating entity may cancel the order if estimated shipping time is not acceptable.
- ◆ Tax Exempt Status
  - Since this is a national contract, knowing the tax laws in each state is the sole responsibility of the vendor.

◆ Payments

- The entity using the contract will make payments directly to the awarded vendor or their affiliates (distributors/business partners/resellers) as long as written request and approval by NCPA is provided to the awarded vendor.

◆ Adding authorized distributors/dealers

- Awarded vendors may submit a list of distributors/partners/resellers to sell under their contract throughout the life of the contract. Vendor must receive written approval from NCPA before such distributors/partners/resellers considered authorized.
- Purchase orders and payment can only be made to awarded vendor or distributors/business partners/resellers previously approved by NCPA.
- Pricing provided to members by added distributors or dealers must also be less than or equal to the pricing offered by the awarded contract holder.
- All distributors/partners/resellers are required to abide by the Terms and Conditions of the vendor's agreement with NCPA.

◆ Pricing

- All pricing submitted shall include the administrative fee to be remitted to NCPA by the awarded vendor. It is the awarded vendor's responsibility to keep all pricing up to date and on file with NCPA.
- All deliveries shall be freight prepaid, F.O.B. destination and shall be included in all pricing offered unless otherwise clearly stated in writing

◆ Warranty

- Proposals should address each of the following:
  - Applicable warranty and/or guarantees of equipment and installations including any conditions and response time for repair and/or replacement of any components during the warranty period.
  - Availability of replacement parts
  - Life expectancy of equipment under normal use
  - Detailed information as to proposed return policy on all equipment

◆ Indemnity

- The awarded vendor shall protect, indemnify, and hold harmless Region 14 ESC and its participants, administrators, employees and agents against all claims, damages, losses and expenses arising out of or resulting from the actions of the vendor, vendor employees or vendor subcontractors in the preparation of the solicitation and the later execution of the contract.

◆ Franchise Tax

- The respondent hereby certifies that he/she is not currently delinquent in the payment of any franchise taxes.

◆ Supplemental Agreements

- The entity participating in this contract and awarded vendor may enter into a separate supplemental agreement to further define the level of service requirements over and above the minimum defined in this contract i.e. invoice requirements, ordering requirements, specialized delivery, etc. Any supplemental agreement developed as a result of this contract is exclusively between the participating entity and awarded vendor.

◆ Certificates of Insurance

- Certificates of insurance shall be delivered to the Public Agency prior to commencement of work. The insurance company shall be licensed in the applicable state in which work is being conducted. The awarded vendor shall give the participating entity a minimum of ten (10) days notice prior to any modifications or cancellation of policies. The awarded vendor shall require all subcontractors performing any work to maintain coverage as specified.

◆ Legal Obligations

- It is the Respondent's responsibility to be aware of and comply with all local, state, and federal laws governing the sale of products/services identified in this RFP and any awarded contract and shall comply with all while fulfilling the RFP. Applicable laws and regulation must be followed even if not specifically identified herein.

◆ Protest

- A protest of an award or proposed award must be filed in writing within ten (10) days from the date of the official award notification and must be received by 5:00 pm CST. Protests shall be filed with Region 14 ESC and shall include the following:
  - Name, address and telephone number of protester
  - Original signature of protester or its representative
  - Identification of the solicitation by RFP number
  - Detailed statement of legal and factual grounds including copies of relevant documents and the form of relief requested
- Any protest review and action shall be considered final with no further formalities being considered.

◆ Force Majeure

- If by reason of Force Majeure, either party hereto shall be rendered unable wholly or in part to carry out its obligations under this Agreement then such party shall give notice and full particulars of Force Majeure in writing to the other party within a reasonable time after occurrence of the event or cause relied upon, and the obligation of the party giving such notice, so far as it is affected by such Force Majeure, shall be suspended during the continuance of the inability then claimed, except as hereinafter provided, but for no longer period, and such party shall endeavor to remove or overcome such inability with all reasonable dispatch.
- The term Force Majeure as employed herein, shall mean acts of God, strikes, lockouts, or other industrial disturbances, act of public enemy, orders of any kind of government of the

United States or any civil or military authority; insurrections; riots; epidemics; landslides; lighting; earthquake; fires; hurricanes; storms; floods; washouts; droughts; arrests; restraint of government and people; civil disturbances; explosions, breakage or accidents to machinery, pipelines or canals, or other causes not reasonably within the control of the party claiming such inability. It is understood and agreed that the settlement of strikes and lockouts shall be entirely within the discretion of the party having the difficulty, and that the above requirement that any Force Majeure shall be remedied with all reasonable dispatch shall not require the settlement of strikes and lockouts by acceding to the demands of the opposing party or parties when such settlement is unfavorable in the judgment of the party having the difficulty

◆ Prevailing Wage

- It shall be the responsibility of the Vendor to comply, when applicable, with the prevailing wage legislation in effect in the jurisdiction of the purchaser. It shall further be the responsibility of the Vendor to monitor the prevailing wage rates as established by the appropriate department of labor for any increase in rates during the term of this contract and adjust wage rates accordingly.

◆ Miscellaneous

- Either party may cancel this contract in whole or in part by providing written notice. The cancellation will take effect 30 business days after the other party receives the notice of cancellation. After the 30th business day all work will cease following completion of final purchase order.

◆ Open Records Policy


- Because Region 14 ESC is a governmental entity responses submitted are subject to release as public information after contracts are executed. If a vendor believes that its response, or parts of its response, may be exempted from disclosure, the vendor must specify page-by-page and line-by-line the parts of the response, which it believes, are exempt. In addition, the respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s).
- The determination of whether information is confidential and not subject to disclosure is the duty of the Office of Attorney General (OAG). Region 14 ESC must provide the OAG sufficient information to render an opinion and therefore, vague and general claims to confidentiality by the respondent are not acceptable. Region 14 ESC must comply with the opinions of the OAG. Region 14 ESC assumes no responsibility for asserting legal arguments on behalf of any vendor. Respondent are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.

# Signature Form

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The undersigned hereby proposes and agrees to furnish goods and/or services in strict compliance with the terms, specifications and conditions at the prices proposed within response unless noted in writing. The undersigned further certifies that he/she is an officer of the company and has authority to negotiate and bind the company named below and has not prepared this bid in collusion with any other Respondent and that the contents of this proposal as to prices, terms or conditions of said bid have not been communicated by the undersigned nor by any employee or agent to any person engaged in this type of business prior to the official opening of this proposal.

Prices are guaranteed: **120 days**

Company name	<u>Ecolane USA, Inc.</u>
Address	<u>940 West Valley Road, Suite 1400</u>
City/State/Zip	<u>Wayne, PA 19087</u>
Telephone No.	<u>712-249-6156</u>
Fax No.	<u>712-764-6101</u>
Email address	<u>ryan.larsen@ecolane.com</u>
Printed name	<u>Ryan J. Larsen</u>
Position with company	<u>Senior Vice President</u>
Authorized signature	<u></u>

# Response to National Cooperative Purchasing Alliance (NCPA) RFP for Transportation Software Solicitation #: 06-19

## **NCPA Region 14 Education Service Center**

Tab 2 – NCPA Administration Agreement



## 2 NCPA Administration Agreement



## Tab 2 – NCPA Administration Agreement

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This Administration Agreement is made as of April 1, 2019, by and between National Cooperative Purchasing Alliance (“NCPA”) and Ecolane USA, Inc. (“Vendor”).

### Recitals

WHEREAS, Region 14 ESC has entered into a certain Master Agreement dated April 1, 2019, referenced as Contract Number 05-33, by and between Region 14 ESC and Vendor, as may be amended from time to time in accordance with the terms thereof (the “Master Agreement”), for the purchase of Transportation Software;

WHEREAS, said Master Agreement provides that any state, city, special district, local government, school district, private K-12 school, technical or vocational school, higher education institution, other government agency or nonprofit organization (hereinafter referred to as “public agency” or collectively, “public agencies”) may purchase products and services at the prices indicated in the Master Agreement;

WHEREAS, NCPA has the administrative and legal capacity to administer purchases under the Master Agreement to public agencies;

WHEREAS, NCPA serves as the administrative agent for Region 14 ESC in connection with other master agreements offered by NCPA

WHEREAS, Region 14 ESC desires NCPA to proceed with administration of the Master Agreement;

WHEREAS, NCPA and Vendor desire to enter into this Agreement to make available the Master Agreement to public agencies on a national basis;

NOW, THEREFORE, in consideration of the payments to be made hereunder and the mutual covenants contained in this Agreement, NCPA and Vendor hereby agree as follows:

#### ◆ General Terms and Conditions

- The Master Agreement, attached hereto as Tab 1 and incorporated herein by reference as though fully set forth herein, and the terms and conditions contained therein shall apply to this Agreement except as expressly changed or modified by this Agreement.
- NCPA shall be afforded all of the rights, privileges and indemnifications afforded to Region 14 ESC under the Master Agreement, and such rights, privileges and indemnifications shall accrue and apply with equal effect to NCPA under this Agreement including, but not limited to, the Vendor’s obligation to provide appropriate insurance and certain indemnifications to Region 14 ESC.
- Vendor shall perform all duties, responsibilities and obligations required under the Master Agreement in the time and manner specified by the Master Agreement.
- NCPA shall perform all of its duties, responsibilities, and obligations as administrator of purchases under the Master Agreement as set forth herein, and Vendor acknowledges that NCPA shall act in the capacity of administrator of purchases under the Master Agreement.
- With respect to any purchases made by Region 14 ESC or any Public Agency pursuant to the Master Agreement, NCPA (a) shall not be construed as a dealer, re-marketer, representative, partner, or agent of any type of Vendor, Region 14 ESC, or such Public Agency, (b) shall not be obligated, liable or responsible (i) for any orders made by Region

14 ESC, any Public Agency or any employee of Region 14 ESC or Public Agency under the Master Agreement, or (ii) for any payments required to be made with respect to such order, and (c) shall not be obligated, liable or responsible for any failure by the Public Agency to (i) comply with procedures or requirements of applicable law, or (ii) obtain the due authorization and approval necessary to purchase under the Master Agreement. NCPA makes no representations or guaranties with respect to any minimum purchases required to be made by Region 14 ESC, any Public Agency, or any employee of Region 14 ESC or Public Agency under this Agreement or the Master Agreement.

- The Public Agency participating in the NCPA contract and Vendor may enter into a separate supplemental agreement to further define the level of service requirements over and above the minimum defined in this contract i.e. invoice requirements, ordering requirements, specialized delivery, etc. Any supplemental agreement developed as a result of this contract is exclusively between the Public Agency and Vendor. NCPA, its agents, members and employees shall not be made party to any claim for breach of such agreement.

◆ **Term of Agreement**

- This Agreement shall be in effect so long as the Master Agreement remains in effect, provided, however, that the obligation to pay all amounts owed by Vendor to NCPA through the termination of this Agreement and all indemnifications afforded by Vendor to NCPA shall survive the term of this Agreement.

◆ **Fees and Reporting**

- The awarded vendor shall electronically provide NCPA with a detailed monthly or quarterly report showing the dollar volume of all sales under the contract for the previous month or quarter. Reports shall be sent via e-mail to NCPA offices at [reporting@ncpa.us](mailto:reporting@ncpa.us). Reports are due on the fifteenth (15<sup>th</sup>) day after the close of the previous month or quarter. It is the responsibility of the awarded vendor to collect and compile all sales under the contract from participating members and submit one (1) report. The report shall include at least the following information as listed in the example below:

Entity Name	Zip Code	State	PO or Job #	Sale Amount

**Total** \_\_\_\_\_

- Each quarter NCPA will invoice the vendor based on the total of sale amount(s) reported. From the invoice the vendor shall pay to NCPA an administrative fee based upon the tiered fee schedule below. Vendor's annual sales shall be measured on a calendar year basis. Deadline for term of payment will be included in the invoice NCPA provides.

<u><b>Annual Sales Through Contract</b></u>	<u><b>Administrative Fee</b></u>
0 - \$30,000,000	2%
\$30,000,001 - \$50,000,000	1.5%
\$50,000,001+	1%

- Supplier shall maintain an accounting of all purchases made by Public Agencies under the Master Agreement. NCPA and Region 14 ESC reserve the right to audit the accounting for a period of four (4) years from the date NCPA receives the accounting. In the event of such an audit, the requested materials shall be provided at the location designated by Region 14 ESC or NCPA. In the event such audit reveals an underreporting of Contract Sales and a resulting underpayment of administrative fees, Vendor shall promptly pay NCPA the amount of such underpayment, together with interest on such amount and shall be obligated to reimburse NCPA's costs and expenses for such audit.

◆ General Provisions

- This Agreement supersedes any and all other agreements, either oral or in writing, between the parties hereto with respect to the subject matter hereof, and no other agreement, statement, or promise relating to the subject matter of this Agreement which is not contained herein shall be valid or binding.
- Awarded vendor agrees to allow NCPA to use their name and logo within website, marketing materials and advertisement. Any use of NCPA name and logo or any form of publicity regarding this contract by awarded vendor must have prior approval from NCPA.
- If any action at law or in equity is brought to enforce or interpret the provisions of this Agreement or to recover any administrative fee and accrued interest, the prevailing party shall be entitled to reasonable attorney's fees and costs in addition to any other relief to which such party may be entitled.
- Neither this Agreement nor any rights or obligations hereunder shall be assignable by Vendor without prior written consent of NCPA, provided, however, that the Vendor may, without such written consent, assign this Agreement and its rights and delegate its obligations hereunder in connection with the transfer or sale of all or substantially all of its assets or business related to this Agreement, or in the event of its merger, consolidation, change in control or similar transaction. Any permitted assignee shall assume all assigned obligations of its assignor under this Agreement.
- This Agreement and NCPA's rights and obligations hereunder may be assigned at NCPA's sole discretion, to an existing or newly established legal entity that has the authority and capacity to perform NCPA's obligations hereunder
- All written communications given hereunder shall be delivered to the addresses as set forth below.

**National Cooperative Purchasing Alliance:**

Name: Matthew Mackel

Title: Director, Business Development

Address: PO Box 701273

Houston, TX 77270

Signature: 

Date: April 1, 2019

**Vendor:** Ecolane USA, Inc.

Name: Ryan J. Larsen

Title: Senior Vice President

Address: 940 West Valley Road, Suite 1400

Wayne, PA 19087

Signature: 

Date: 3/10/19

# Response to National Cooperative Purchasing Alliance (NCPA) RFP for Transportation Software Solicitation #: 06-19

## **NCPA Region 14 Education Service Center**

Tab 3 – Vendor Questionnaire



### 3 Vendor Questionnaire



## Tab 3 – Vendor Questionnaire

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Please provide responses to the following questions that address your company's operations, organization, structure, and processes for providing products and services.

◆ States Covered

- Bidder must indicate any and all states where products and services can be offered.
- Please indicate the price co-efficient for each state if it varies.

**Ecolane pricing does not vary from State to State**

☒ **50 States & District of Columbia** (Selecting this box is equal to checking all boxes below)

<input type="checkbox"/> Alabama	<input type="checkbox"/> Maryland	<input type="checkbox"/> South Carolina
<input type="checkbox"/> Alaska	<input type="checkbox"/> Massachusetts	<input type="checkbox"/> South Dakota
<input type="checkbox"/> Arizona	<input type="checkbox"/> Michigan	<input type="checkbox"/> Tennessee
<input type="checkbox"/> Arkansas	<input type="checkbox"/> Minnesota	<input type="checkbox"/> Texas
<input type="checkbox"/> California	<input type="checkbox"/> Mississippi	<input type="checkbox"/> Utah
<input type="checkbox"/> Colorado	<input type="checkbox"/> Missouri	<input type="checkbox"/> Vermont
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Montana	<input type="checkbox"/> Virginia
<input type="checkbox"/> Delaware	<input type="checkbox"/> Nebraska	<input type="checkbox"/> Washington
<input type="checkbox"/> District of Columbia	<input type="checkbox"/> Nevada	<input type="checkbox"/> West Virginia
<input type="checkbox"/> Florida	<input type="checkbox"/> New Hampshire	<input type="checkbox"/> Wisconsin
<input type="checkbox"/> Georgia	<input type="checkbox"/> New Jersey	<input type="checkbox"/> Wyoming
<input type="checkbox"/> Hawaii	<input type="checkbox"/> New Mexico	
<input type="checkbox"/> Idaho	<input type="checkbox"/> New York	
<input type="checkbox"/> Illinois	<input type="checkbox"/> North Carolina	
<input type="checkbox"/> Indiana	<input type="checkbox"/> North Dakota	
<input type="checkbox"/> Iowa	<input type="checkbox"/> Ohio	
<input type="checkbox"/> Kansas	<input type="checkbox"/> Oklahoma	
<input type="checkbox"/> Kentucky	<input type="checkbox"/> Oregon	
<input type="checkbox"/> Louisiana	<input type="checkbox"/> Pennsylvania	
<input type="checkbox"/> Maine	<input type="checkbox"/> Rhode Island	

☒ **All US Territories and Outlying Areas** (Selecting this box is equal to checking all boxes below)

- |   |   |
|---|---|
| <input type="checkbox"/> American Samoa                 | <input type="checkbox"/> Northern Mariana Islands |
| <input type="checkbox"/> Federated States of Micronesia | <input type="checkbox"/> Puerto Rico              |
| <input type="checkbox"/> Guam                           | <input type="checkbox"/> U.S. Virgin Islands      |
| <input type="checkbox"/> Midway Islands                 |   |

◆ **Minority and Women**

**Business Enterprise (MWBE) and (HUB) Participation**

- It is the policy of some entities participating in NCPA to involve minority and women business enterprises (MWBE) and historically underutilized businesses (HUB) in the purchase of goods and services. Respondents shall indicate below whether or not they are an M/WBE or HUB certified. **Ecolane - N/A**
  - **Minority / Women Business Enterprise**
    - Respondent Certifies that this firm is a M/WBE ☐
  - **Historically Underutilized Business**
    - Respondent Certifies that this firm is a HUB ☐

◆ **Residency**

- Responding Company's principal place of business is in the city of Wayne, State of Pennsylvania, USA

◆ **Felony Conviction Notice**

- Please Check Applicable Box;
  - ☐ A publically held corporation; therefore, this reporting requirement is not applicable.
  - ☒ Is not owned or operated by anyone who has been convicted of a felony.
  - ☐ Is owned or operated by the following individual(s) who has/have been convicted of a felony
- If the 3<sup>rd</sup> box is checked, a detailed explanation of the names and convictions must be attached.

◆ **Distribution Channel**

- Which best describes your company's position in the distribution channel:

<input checked="" type="checkbox"/> Manufacturer Direct	<input type="checkbox"/> Certified education/government reseller
<input type="checkbox"/> Authorized Distributor	<input type="checkbox"/> Manufacturer marketing through reseller
<input type="checkbox"/> Value-added reseller	<input type="checkbox"/> Other: _____

◆ **Processing Information**

- Provide company contact information for the following:
  - **Sales Reports / Accounts Payable**  
Contact Person: Susan Love  
Title: Finance Manager  
Company: Ecolane USA, Inc.  
Address: 940 West Valley Road, Suite 1400  
City: Wayne State: PA Zip: 19087  
Phone: 610-312-0033, ext. 162 Email: susan.love@ecolane.com



▪ Purchase Orders

Contact Person: Susan Love  
 Title: Finance Manager  
 Company: Ecolane USA, Inc.  
 Address: 940 West Valley Road, Suite 1400  
 City: Wayne State: PA Zip: 19087  
 Phone: 610-312-0033, ext.162 Email: susan.love@ecolane.com

▪ Sales and Marketing

Contact Person: Rex Clark  
 Title: Vice President of Business Development  
 Company: Ecolane USA, Inc.  
 Address: 940 West Valley Road, Suite 1400  
 City: Wayne State: PA Zip: 19087  
 Phone: 530-383-1414 Email: rex.clark@ecolane.com

◆ Pricing Information

- In addition to the current typical unit pricing furnished herein, the Vendor agrees to offer all future product introductions at prices that are proportionate to Contract Pricing.
  - If answer is no, attach a statement detailing how pricing for NCPA participants would be calculated for future product introductions.
 

☒ Yes      ☐ No
- Pricing submitted includes the required NCPA administrative fee. The NCPA fee is calculated based on the invoice price to the customer.
 

☒ Yes      ☐ No
- Vendor will provide additional discounts for purchase of a guaranteed quantity.
 

☒ Yes      ☐ No

◆ Cooperatives

- List any other cooperative or state contracts currently held or in the process of securing.

Cooperative/State Agency	Discount Offered	Expires	Annual Sales Volume

# Response to National Cooperative Purchasing Alliance (NCPA) RFP for Transportation Software Solicitation #: 06-19

## **NCPA Region 14 Education Service Center**

Tab 4 – Vendor Profile



## 4 Vendor Profile

### 4.1 Vendor Information

Ecolane USA, Inc. is a multinational software corporation with headquarters located at 940 West Valley Road, Wayne, Pennsylvania (Philadelphia). The company also has a sales office located at 4132 Main Street, Elk Horn, Iowa. The company has been in business since 2002 internationally, and in the United States since 2008. Ecolane is a Delaware corporation, and the Ecolane DUNS number is 945741465. Ecolane is registered with the Central Contractor Registration. Ryan Larsen, Senior Vice President, and Ecolane's second-in-command is authorized to negotiate contractual work for the company and can be reached at 712-249-6156. Ecolane currently has 170+ active customers and 20 implementations that are in progress, six of which will be "live" within the next two months.

In May 2016, National Express acquired Ecolane. This relationship enables Ecolane to draw from decades of experience with demand response, fixed route, shuttle, and commuter operations to offer enhanced service offerings for all our clients and provides Ecolane with the best financial strength of any software company in transit.

Ecolane works alongside National Express Transit Corporation to provide software solutions that will enhance the service offerings for their transit clients. National Express Transit Corporation (NEXT) and Ecolane utilize the internal resources of our parent, NELLC, for home office support including human resources, safety, environmental, operations, maintenance, purchasing, labor, relations, and legal assistance.

NELLC, with its home office in Lisle, Illinois, serves more than 370 clients in 31 states and 4 Canadian provinces with over 22,000 vehicles. NELLC is a North American division of National Express Group (NEG). NEG employs more than 44,000 people worldwide across its bus, rail, and coach divisions that operate throughout Europe, North America, and the Middle East. National Express and its predecessor companies have been in the business of passenger transportation since 1917.

Ecolane is part of the National Express family of companies including the following:

- Public Transit
  - National Express Transit Corporation
  - Suburban Paratransit
- School Transportation
  - Durham School Services
  - Peterman
  - Stock Transportation
  - Safeway
  - Provider
  - Septran
  - White Plains
  - Smith Bus

## Our Mission

Ecolane's mission is to provide software solutions that continuously improve the productivity of demand-response transportation services and enhance personal mobility. To achieve this mission, Ecolane has been consistently able to demonstrate four key values that define the character of our company. The attention Ecolane places on these values have made the Ecolane DRT product a leader in the Demand-Response/Paratransit software industry.

## Ecolane Is...

### Trusted

Ecolane builds and maintains relationships through common understanding and mutual goals with each customer. Ecolane collaborates with other industry-leading companies, listens to our customers, and have created a team of highly dedicated professionals, to meet the needs of the industry.

### Reliable

Ecolane offers a solid, reliable, and field-proven solution. The solution is more than just the software. Ecolane offers a comprehensive support package and a team of experts to ensure that the transition to Ecolane DRT is smooth, effective, and delivers the desired results.

### Passionate

Ecolane is open to new ideas, eager to improve, succeed and to continue its success. Ecolane focuses on determining better ways to harness "cutting edge" technology, searching for a better way to schedule transportation and is 100% committed to the success of our customers.

### Caring

Ecolane focuses on providing sustainable solutions and being socially responsible. Ecolane believes that a solution that provides benefit, not only for our customers but also to the community and the environment has the highest value.

## 4.2 Ecolane's History

Ecolane Inc. was established in 2002 with an idea to create software specifically for dynamic carpools. From that beginning idea, Ecolane developed carpool software from 2003 to 2005 that had the ability of "matching" drivers and riders automatically, based on the trip details. Ecolane DRT uses the same philosophy of matching trips that are going from locations in proximity to each other to destinations in the same direction at the same time.

In 2005, Ecolane decided to concentrate on demand response transit. Ecolane developed a version for the European market for organizing disability transport trips, like the Americans with Disabilities Act (ADA) transport in the United States. This Ecolane DRT System greatly improved efficiency for Disability Transport Programs in Finland. Ecolane then collaborated with a telecom company, which teamed with Ecolane in the newly created brokerage market.

In 2007, Ecolane entered the US market with a demonstration project in Baltimore, Maryland using Ecolane DRT version 2.0. During the demonstration project, Ecolane focused heavily on understanding the operational challenges faced by transit systems. After the demonstration, it provided stellar productivity improvements.

In 2008, Ecolane made a strategic decision to concentrate solely on the US market, and Ecolane USA, Inc. was established. That same year, Arlington Handitran's paratransit service chose Ecolane DRT. Currently, Handitran operates at an average of 96% on-time performance (OTP), delivers approximately 135,000 trips/year, and has seen steady improvement using Ecolane

DRT with improved OTP, reduced deadhead, increased Rides per Hour (RPH) and decreased fuel consumption.

After 2009, Ecolane continued to grow rapidly, with many additional customers enjoying the ease of use, and savings provided by the Ecolane DRT solution. By 2011, Ecolane had many new customers enjoying this cutting-edge technology. Also, Ecolane was first to utilize the Ecolane Touch Screen MDT using the Android tablet platform. Ecolane had over 500 Android Tablets in service at this time. In 2012, among other implementations, Ecolane was selected by Akron Metro in Ohio and by the State of Pennsylvania for a statewide software implementation. Some highlights include the Ecolane Solution generating a savings of \$85,000 per month for Akron Metro, due to improved scheduling over their previous scheduling Solution.

Throughout the years, 2013-2015, Ecolane continued to offer best-in-class support, services, and cutting-edge technology to our customers. As we move into new agencies in Oregon, California, Florida, Nebraska, Ohio, and Illinois, our clients are not only realizing savings but also improved service to those who lack mobility and need this service the most.

In May of 2016, Ecolane was acquired by National Express. This relationship enables Ecolane to draw from decades of experience with demand response, fixed route, shuttle, and commuter operations to offer enhanced service offerings for all our clients and provides Ecolane with the best financial strength of any software company in transit. In 2017, Ecolane was the first to bring to market an automated, paratransit/demand response, mobile app. This mobile app is fully integrated with Ecolane DRT and can automatically schedule a trip booked from the mobile app by a passenger and can even handle fares charged via a credit card safely and securely. Our mobile app is built from the ground up for our rapidly changing digital society to meet and exceed passengers' expectations. With this app, Ecolane can simplify your operations as well as the lives of the riders you transport. Ecolane created this app as riders are looking for freedom to review and manage their personal transportation needs more and agencies need help streamlining scheduling procedures. This app will do both as it is able to accept trips from passengers, schedule them automatically and fit them into the schedule per the parameters set up by the agency. The app is also able to provide notifications of when a vehicle is arriving and even show where the vehicle is on the map. If agencies are worried about the app being abused by passengers, they simply must set restrictions on funding sources and certain destinations at a per passenger level using included administrative tools.

In addition, to follow right along with this, we have recently released Ecolane voice scheduling using an Amazon Alexa skill we've created. This allows customers to book trips simply by talking to Alexa! Great for senior centers, clients, or centers booking multiple trips for individuals. Passengers simply speak to Alexa, asking it to log them in and to book them a trip and Alexa will ask all the necessary questions after that to finish booking the trip. Simple questions such as:

- What day the trip is
- What time
- From where – Passengers can easily say from 'Home' as this will be saved as a favorite address for all passengers
- To where – Passengers can say an address, or a favorite destination, such as 'Work.'
- Purpose of the trip
- Followed up by a confirmation of the trip request by Alexa

***This is your opportunity*** to take advantage of this next generation technology, provide savings to your company, and offer services to your riders with the best software on the market. Entering as an Ecolane customer now, will not only take your company to the next level but will also give you a wealth of opportunities. We look forward to the opportunity of working with your agency!



## 4.4 Ecolane's Intelligent Transportation System

The transportation routing software industry is often labeled as Intelligent Transportation Systems (ITS). In today's age of ever-evolving technology, some systems prove to clearly be more "Intelligent," while other established systems are no longer cutting-edge technology. Ecolane entered a niche overwhelmed by vendors using antiquated hardware and software, where large industry players consistently fail to deliver upon promised solutions. Ecolane has replaced many systems that have been installed by these large industry players.

- Who is Ecolane's competition in the marketplace? RouteMatch, Trapeze, Mobilitat, CTS, Shah Software, and Stratagen.

As an example, Ecolane currently has a statewide contract with the state of Pennsylvania to supply Ecolane DRT to over 60 transit agencies within the state. Ecolane replaced software at transit agencies that had systems such as Trapeze, RouteMatch, and Stratagen. Ecolane was also chosen and implemented by the Nebraska NEMT for their large agency/brokerage. Additional letters and contacts for satisfied Ecolane customers can be found within Section 6 of this RFP Response.

Ecolane teams have directed project management on two continents including companies in the Fortune 500. With installations from Finland, to Washington DC, we have the experience and robust software to give the National organizations what you're searching for. We intend to perform all services outlined within this RFP and enter into an agreement with the NCPA if awarded.

## 4.5 Benefits of Ecolane in Action

PennDOT; Knoxville Area Transit in Knoxville, Tennessee; Connect Transit in Normal, Illinois; Hub City Transit in Hattiesburg, Mississippi; and 9 Town Transit (Estuary Transit District) in Connecticut have been awarded best system awards using Ecolane DRT Solution. We want the same for all customers using Ecolane DRT.





## America's Transportation Awards Regional 2018 Award Winner

Pennsylvania Department of Transportation—  
Statewide Demand-Response Transit Scheduling  
Software Implementation



### 4.6 Expertise and Major Dial-a-Ride/Paratransit Market Achievements

Listed below are what differentiates Ecolane from our competitors:

Achievement	Result	Advantage
99.99% Ecolane DRT System Availability	Ecolane DRT is very stable and reliable. It will be available for your agency as you proceed to transport your customers.	Excellent customer satisfaction with ability to use the Ecolane DRT solution from work, home, and web-enabled mobile phone for anytime, anywhere access to data



Automatic Scheduling Intelligence	Automatic Scheduling Intelligence incorporates the benefits learned from the best human schedulers with fully automated scheduling	Higher customer satisfaction rates while improving productivity and rides per hour (RPH) which reduces agency cost in service hours, deadhead and fuel consumption
Real-Time Re-optimization	Real-time re-optimization is performed for each trip as close as possible to the actual delivery time of the trip	Schedule adaptation in real-time to accommodate cancellations, no-shows, and new trip requests, creating more efficient schedules
Android Based MDT	Tablet unit with real-time two-way communication with schedule updates, real-time progress reports, AVL, canned messages, Global Positioning System (GPS), odometer and touch screen	Immediate cost-benefit: ROI of \$5,000-\$8,000 per revenue vehicle
Completely Web-Based Scheduling Featuring Independent Automation	Ability to continuously route and schedule trips to routes creating highly effective schedules	Compared to all other major software vendors, Ecolane delivered an average RPH increase of 44 percent to as high as 151 percent. That is an impactful difference.
Completely Web-Based Architecture	All features including reports are web-based requiring no software to be installed on any workstation	Secure access from any location, reduction of IT management and workstation costs
Short Message Service (SMS) Text Messaging	Ability to send an SMS text message to the customer cell phone as the vehicle approaches	Improved customer service and system reliability
Self Service Web Bookings	The ability for the customer to schedule trips using address auto-complete functionality with no pre-loaded addresses required to book trips by the customer	Great customer service enhancement freeing staff to focus on improvement of the operation
Service Alerts	Alerts to dispatch directing them where to look for possible operational issues	Focuses dispatchers on proactive troubleshooting; such as possible missed trips, no-shows, possible missed will-call trips, late 1st pickup, trips without a vehicle, etc.
Integration with Google Earth	Ability to see driver actions at all stops and at automated GPS pings in between	Improve customer service to address complaints and no-show resolution

Real-Time On-Time Performance (OTP)	Generation for real-time OTP for monitoring the operation	Management can determine the OTP at any time raising the awareness of OTP to staff
Run Utilization	Ecolane DRT displays the utilization of each vehicle for future trip scheduling	Vehicle utilization information allows reservations agents to negotiate alternatives for busy trip demand times
Completely Web-Based Reporting	Ecolane DRT reports are available via the web without the need for proprietary software such as Crystal Reports	Web-based reports can be exported to Word, PDF, Excel, and CSV file by staff
Dashboard Reporting	Management and interested stakeholders able to drill down into system data on the day of service	Accountability for all levels of the organization with the ability to select specific drivers, companies, and runs for review
Mobile App for Booking, Where's my ride info and Self-Registration capabilities	Riders are looking for freedom to review and manage their personal transportation needs. Agencies need streamlined scheduling operations. This app will do both as it can accept trips from passengers and schedule them automatically and fit them into the schedule per the parameters set up by the Agency.	Agencies can simplify their operations as well as the lives of their riders. Agencies can limit what funding sources and destinations are booked at the passenger level using included administrative tools.

We are continually striving to bring the best technology and solutions to our Ecolane customers who use our technology to **Do More, Take Control and Achieve Goals.**

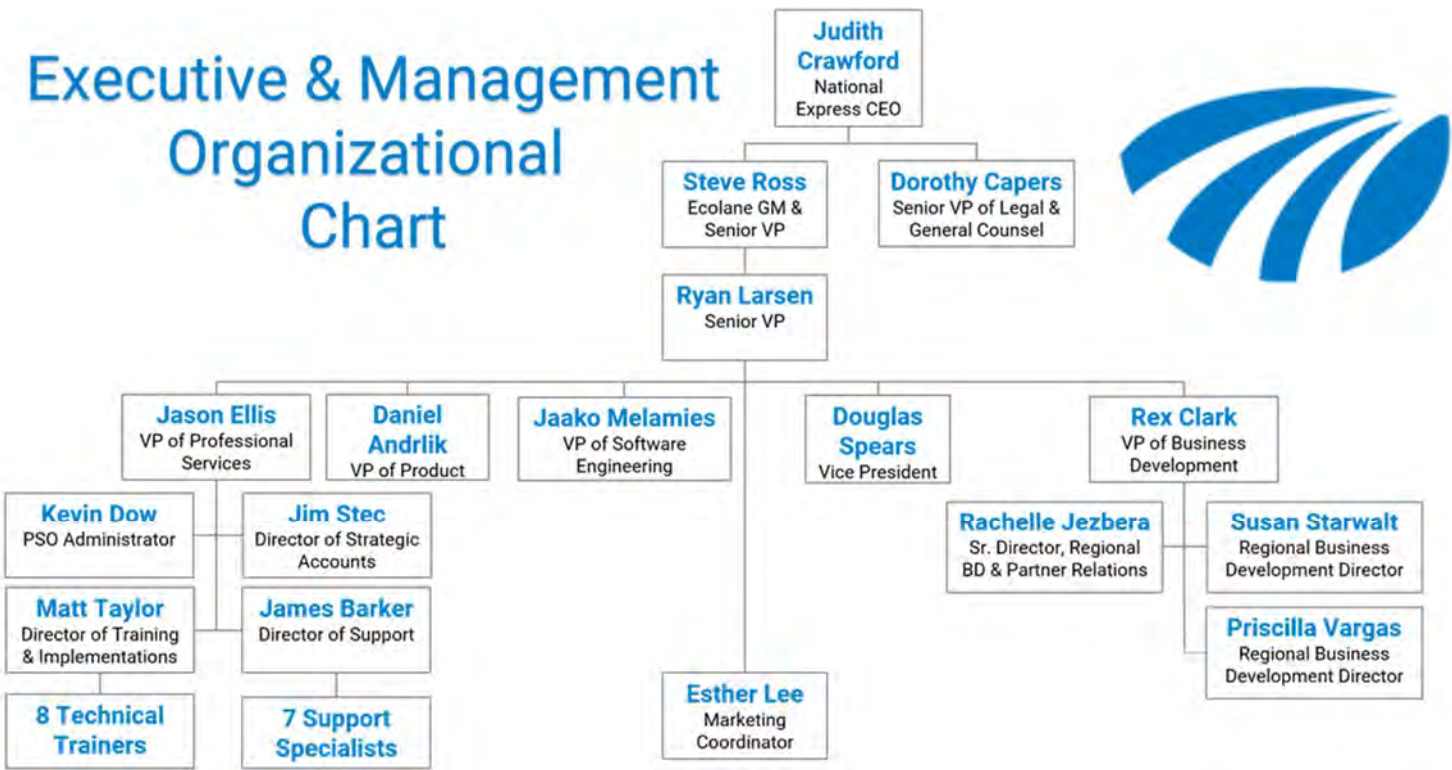


## 4.7 Project Team

Ecolane has been in the business of delivering paratransit software solutions since 2008 in the United States. However, Ecolane has expanded its services by also offering mobility software solutions, including but not limited to, mobility on demand, microtransit, Mobility as a Service (MaaS) and first mile, last mile operations. Each Ecolane Executive actively participates in the development of the software and understands fully how the features benefit Ecolane customers.

Ecolane has a firm foundation, which was established by key executives and hardworking staff. Their knowledge, experience, and dedication have and continue to lead Ecolane, helping it, and its customers grow and succeed by leaps and bounds. Ecolane’s Executives have extensive experience in the transit industry, from entry-level positions to Transit Director. This experience helps them to truly understand the needs of transit agencies, technologies, and processes that improve the software. As a result, Ecolane DRT software gives our customers the ability to take a managerial role in operations and removes the need to monitor every single detail.

### 4.7.1 Ecolane Team Organizational Chart



### 4.7.2 Key Personnel

Ryan Larsen, Senior Vice President, will be the Binding Authority for this project. Ryan is a transit industry veteran with 34 years of experience in transit, paratransit, transportation software, consulting, and executive level management of paratransit service. Email: [ryan.larsen@ecolane.com](mailto:ryan.larsen@ecolane.com)

Rex Clark, Vice President of Business Development, will be the Account Manager for this project. Rex is responsible for the accounts in this area and furthers the successful growth of Ecolane as a company and the product line. He is a 30+ year veteran of information technology in passenger transportation and has experience working with public agencies, private operators, and software developers. His breadth of experience spans nearly every area of information technology, fixed route, paratransit, and shuttle services, including server maintenance, network administration, vendor relations, On-Board technology, system integration, radio/phone, GPS/AVL management, video systems, support, safety, and more. Email: [rex.clark@ecolane.com](mailto:rex.clark@ecolane.com)

Matt Taylor Director of Training and Implementation will be the Project Manager and direct coordinator for Sound Generations software implementation. He will be available as needed for the project. He will work as the liaison between Sound Generations, and the Ecolane project staff to ensure that Sound Generations receives the proper support necessary for this project. Email: [matt.taylor@ecolane.com](mailto:matt.taylor@ecolane.com)

The Technical Trainers that are assigned to a project by the Project Manager are incredibly dedicated to ensuring all facets of the project implementation are covered in the time allotted. While a Technical Trainer is onsite, they are also 100% committed to that project, by design, and the Project Manager is the trainer's support to ensure the trainer's total attention is on the project. A Technical Trainer may have multiple projects at different stages that are being implemented simultaneously; however, while on site they are dedicated 100% to that project. The Project Manager manages the trainer's time and ensures that adequate staff is allotted for each phase of the implementation.

Once a project has been designated as "Live," then the project is handed over to the Support Staff. Ecolane's Support Services team complete rigorous training before being released to support our customer base. They have a joint total of nearly 60 years of experience providing support services and are backed by managers who have been with the company since 2008. Support is 100% dedicated to providing support only, and to call on the managers should they find the necessity for additional training or retraining. Support is designed to aid the client and end user to get the most efficient use of the software and to communicate any issues that may arise to the appropriate staff whether that is Training or Development.

- Ecolane key contacts with the title, address, phone, and email address.
  - All of the Ecolane key contacts can be reached by calling the Ecolane main phone number, 610-312-0033, and requesting their extension. The Ecolane mailing address for the key contacts is:

Ecolane USA, Inc., Headquarters Office  
940 West Valley Road, Suite 1400  
Wayne, PA 19087

### 4.7.3 Ecolane Marketing with NCAP

- Describe how your company will market this contract if awarded.
  - Ecolane will place notification of this award through-out their marketing collateral including web, print, social media and at tradeshow. Members of the Ecolane Sales Team will be notified and encouraged to promote award to all potential clients. Ecolane's Business Development Vice President will lead in developing marketing strategies that promote Ecolane to NCPA participating organizations.
- Describe how you intend to introduce NCPA to your company.

- Ecolane will conduct an internal introductory meeting for NCPA and provide training on the details of the NCPA award to all employees. All employees will be encouraged to promote award to all current and potential clients.
- Describe your firm's capabilities and functionality of your online catalog/ordering website.
  - Not applicable. We ask that any interested parties contact the Ecolane representative for a customized proposal.

#### 4.7.4 Ecolane Support

- Describe your company's Customer Service Department (hours of operation, number of service centers, etc.)

Ecolane's commitment to superior customer service, the company, provides comprehensive customer support. The detailed Ecolane Support Plan is included in Tab 8 of this RFP Response.

**Highlights of Ecolane Support include:**

- Email support at helpdesk.ecolane.com
- Telephone support during business hours
- 24 hour a day On-line support
  - Online Software solutions library
  - Online product documentation
  - Knowledge base and FAQ

#### 4.7.5 Additional Vendor Responses

- Green Initiatives: As our business grows, we want to make sure we minimize our impact on the Earth's climate. We are taking every step we can to implement innovative and responsible environmental practices throughout NCPA to reduce our carbon footprint, reduce waste, energy conservation, and ensure efficient computing and much more. To that effort, we ask respondents to provide their companies environmental policy and/or green initiative.

Whenever possible, Ecolane USA, Inc. tries to use recycled products. Ecolane USA, Inc. is committed to reducing carbon emissions and the amount of paper that is wasted in paratransit scheduling annually. For additional information, please review Ecolane's Commitment to Environmentally Sustainable Solutions found at the front of this RFP Response in the Letter of Transmittal.

- Vendor Certifications (if applicable): Provide a copy of all current licenses, registrations and certifications issued by federal, state and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing respondent to perform the covered services including, but not limited to, licenses, registrations, or certifications. Certifications can include M/WBE, HUB, and manufacturer certifications for sales and service.

No Vendor Certifications are required for the Ecolane Software Solution. All other required documents are located in Tab 9 of this RFP Response.



# Response to National Cooperative Purchasing Alliance (NCPA) RFP for Transportation Software Solicitation #: 06-19

## **NCPA Region 14 Education Service Center**

Tab 5 – Products and Services



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## 5 Products and Services

This document provides an overview of the Ecolane DRT solution, the benefits, and features it can offer to transportation providers and brokers, and how Ecolane DRT can support different use cases that providers and brokers may have.

This document also provides information on the customization, training, and support services that Ecolane delivers.

### 5.1 Version history

Version	Description
1.0	<p>First version for release 4.6. Changes since release 4.5:</p> <ul style="list-style-type: none"><li>• <i>5.5.1.8 Funding and billing management</i>: Fare type 'balance' added.</li><li>• <i>5.5.1.10 User administration</i>: Updated with details on password authentication via an external LDAP server.</li><li>• <i>5.5.1.5.1 Prepaid balance</i>: New section added about the client prepaid balance feature.</li><li>• Chapter added with a preview of the 4.6 new features and changes.</li></ul>

#### 5.1.1 Audience

This document is intended for transportation providers, coordinators, broker agencies, or anyone interested in the Ecolane DRT solution.

#### 5.1.2 Prerequisites

The user of this document is assumed to have a general understanding of the basics of demand response transportation.

#### 5.1.3 Typographical conventions

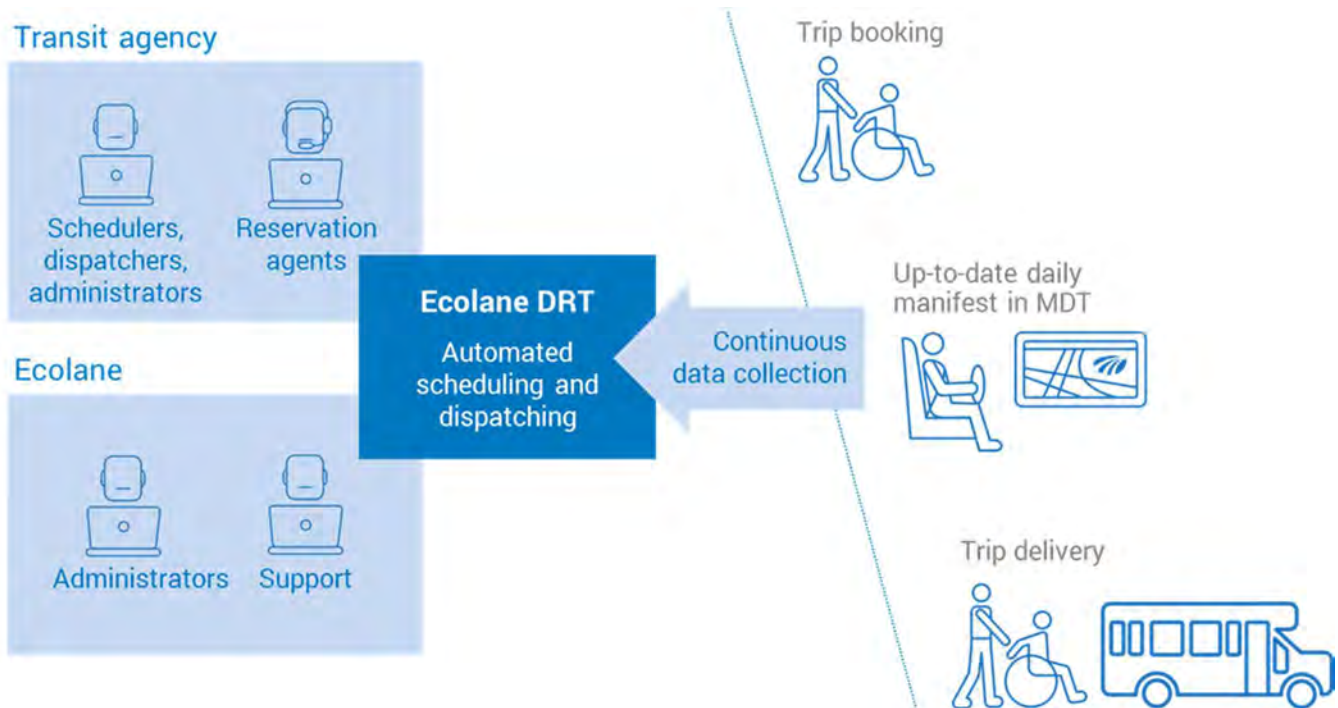
<b>bold</b>	Bold font is used for UI elements, for example, page and tab titles, buttons, menu items, field names, and keyboard keys.
<i>italics</i>	Italics are used in references and to highlight relevant terms and concepts.
monospace	The monospace font is used, for example, for file names, directory paths, parameter names and values, and command line input text.

## 5.2 Overview

Ecolane DRT is an intuitive, web-based software solution designed to meet the complex needs of transit agencies of all sizes. It enables agencies to serve their communities better using their existing resources through productivity gains and automation. With the Ecolane DRT solution,

agencies can meet the increasing demand for transportation in an industry where costs are rising.

Figure 1 illustrates the core functionality of the Ecolane DRT solution.



**Figure 1. Overview of Ecolane DRT**

Ecolane DRT's intelligent automated processes handle the scheduling and dispatching of trips to Mobile Data Tablets (MDT) installed in vehicles. The solution provides real-time information updates to drivers including same-day schedule changes due to trip cancellations, no-shows, or traffic congestion. The result is maximized efficiency and productivity in an agency's use of their resources.

With the highly automated and hosted Ecolane DRT solution, transit agency employees can focus their efforts on service monitoring and proactive problem-solving to ensure the highest Quality of Service (QoS) for their passengers. Continuous data collection from the MDTs provides real-time data for monitoring, reporting, and billing. Manual dispatching is also supported both to ensure flexibility and to support agencies that use printed manifests.

Ecolane DRT's web-based user interface provides agencies with comprehensive real-time data on their service and the tools needed to manage and monitor their operations efficiently.

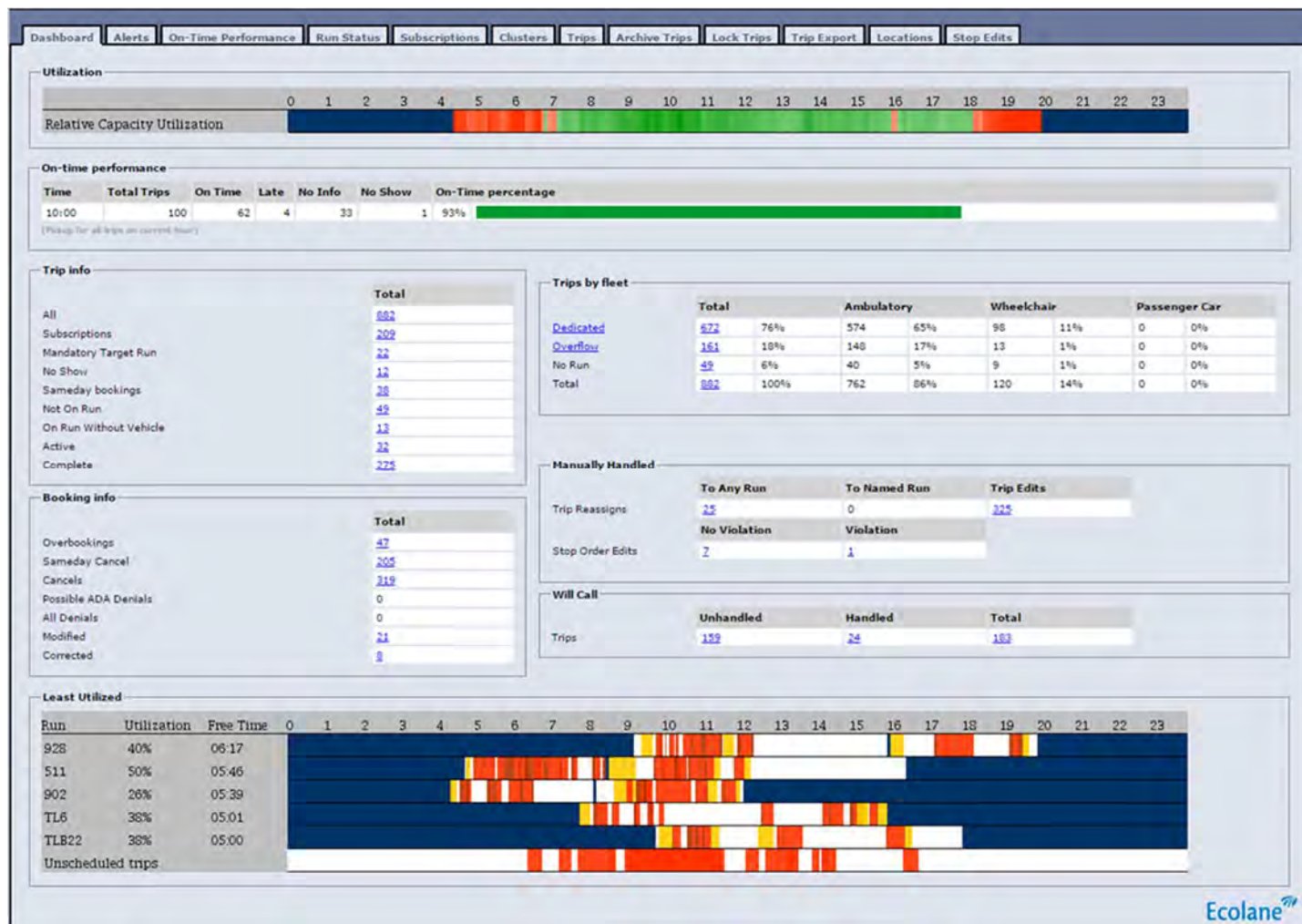


Figure 2. The Ecolane DRT user interface

## 5.2.1 Your challenges and our solutions

Transportation is a complex industry, and every agency faces challenges. Ecolane's solution has been developed specifically to meet the extensive and varying needs of transit agencies.

### Manual and inefficient scheduling?

Ecolane DRT's automated scheduling has been proven to provide a higher level of productivity for transit agencies.

### Inaccurate on-time performance?

On-time performance (OTP) is GPS-verified, providing trustworthy and reliable data.

### High no-show rates?

With Ecolane DRT, consistent pick-up windows and SMS notifications decrease the number of no-shows that agencies deal with.

### Disappearing drivers?

Real-time mapping provides precise location data for all vehicles at all times.

**Cumbersome reporting?**

Automated data collection in real time provides robust reporting with a simple point-and-click user interface.

**User-unfriendly enterprise software?**

Ecolane DRT is an entirely web-based application that works across all platforms and runs altogether inside any modern web-browser.

## 5.2.2 Our key differentiators

There are many scheduling products on the market, but Ecolane offers the only solution providing the unique blend of automation, accessibility, and hands-on support that transit agencies require to prosper in a changing market.

### 5.2.2.1 Manual scheduling vs. automated processes

The scheduling capabilities of Ecolane DRT consistently provide the most productive solution for its users. Ecolane DRT's scheduling and dispatching solution is unique due to its method of optimizing schedules throughout the day of service. This enables Ecolane DRT to adapt to same-day and last-minute changes – leading to unparalleled efficiency and an increased QoS for passengers.

Both manual and automated scheduling provide benefits for transit operations. Ecolane DRT's scheduling intelligence combines the processes required for automated scheduling with the best features of the most experienced schedulers. In addition to increased efficiency and productivity, a high level of QoS must be maintained for passengers while creating logical routes that keep drivers satisfied. Occasionally these goals may conflict, but quite often, they move scheduling in a better direction, increasing efficiency and passenger satisfaction.

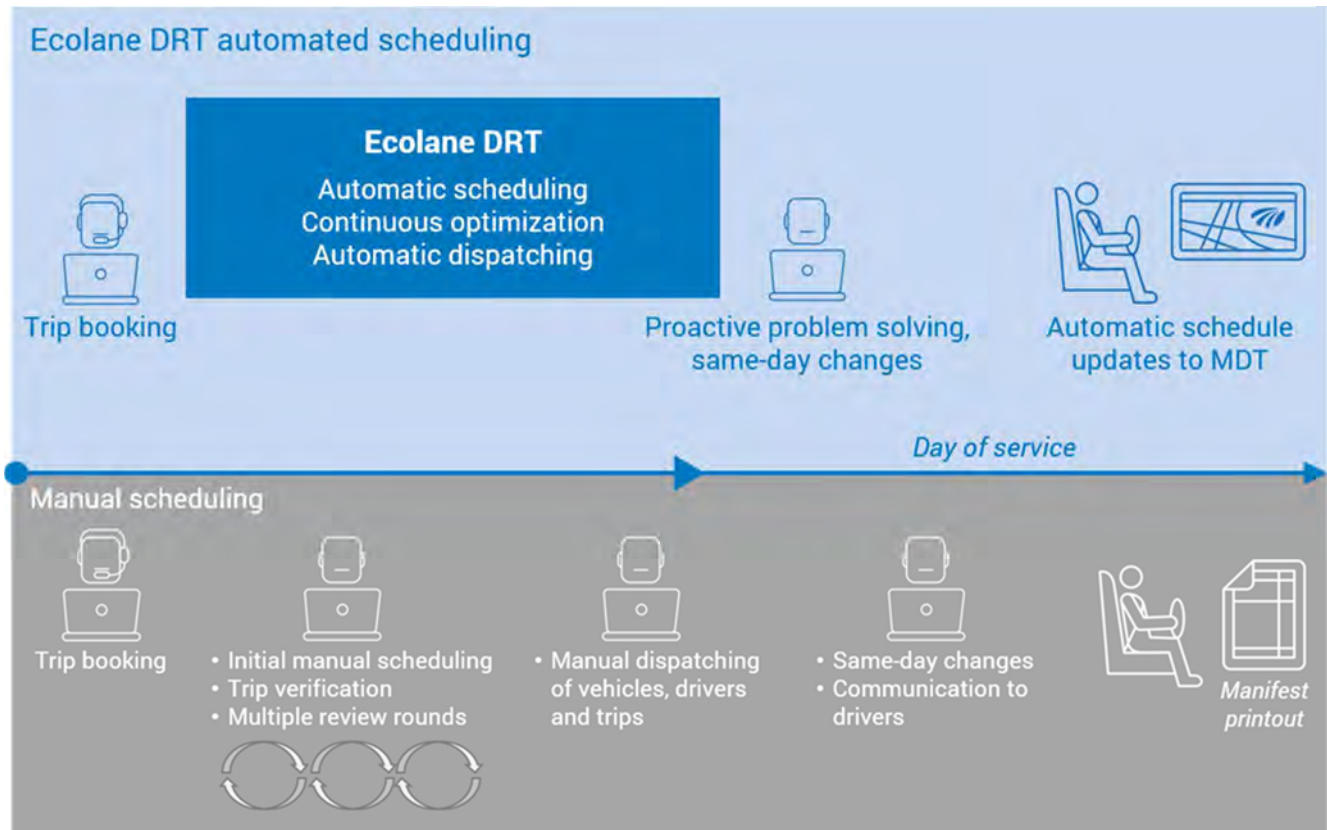
On average, Ecolane DRT's scheduling has been shown to provide a 25–40% higher rides-per-hour productivity than competing systems while maintaining and improving passenger QoS. This is accomplished without experienced schedulers being forced to spend countless hours reviewing schedules.

*Figure 3* illustrates the benefits of Ecolane DRT's automated scheduling compared to manual scheduling.

A key advantage of automated scheduling is that it never has a bad day, it is never on holiday, and it never retires. It keeps on doing the same work day-to-day, and when it learns new tricks, it never forgets them. There is no better method for providing service consistency.

Ecolane has invested considerable resources in adapting and incorporating the best traits of experienced schedulers into Ecolane DRT's automated scheduling. Ecolane DRT provides a flexible scheduling solution based on a configurable hybrid of calculated efficiency algorithms tailored to transit agency-specific priorities. This focus delivers an optimal customer experience in transportation. In the following sections, you can see some examples of this focus.





**Figure 3. Automated vs. manual scheduling**

#### 5.2.2.1.1 Common location optimization for grouping trips

Experienced schedulers typically start the scheduling process by planning group trips together. After plotting the group trips on the base routes, they start adding additional trips.

Ecolane has developed a solution for carrying out the same process automatically, without the need for manually defined groups. The core of this solution is a process called 'common location' optimization: it analyzes trips that start or end at (or nearly at) the same location and time and combines these trips into automatically created groups. Reducing the number of vehicles required to deliver these trips leads to an increase in productivity. Common location optimization can be flexibly configured to suit the needs of an individual agency.

Of course, there are times when the organization of groups has nothing to do with efficiencies and everything to do with human experience, or even with a distinct contract with a given facility. Ecolane DRT provides easy-to-use, robust tools for creating these groups manually, and the automated scheduling algorithm adapts the rest of the schedule around them.

Ecolane DRT's hybrid solution allows each transit agency to strike the perfect balance between these unique situations and the power of automation, maximizing productivity while honoring the obligations of the agency's other agreements.

#### 5.2.2.1.2 Prioritization based on trip difficulty level

Experienced staff schedulers usually plan the most difficult trips first. Ecolane has adapted similar functionality to Ecolane DRT's automated scheduling: A systematic approach is used to define a 'difficulty level' for each trip and then to process the trips accordingly.

Without any need for manual intervention, difficult trips are processed first, and additional trips are added to the schedule afterwards. Ecolane DRT examines trip difficulty based on the combination of an individual trip, all other trips, and the vehicle capacity available for delivering the trip.

#### 5.2.2.1.3 Directional scheduling

Experienced schedulers tend to plan trips for vehicles moving in a particular direction (such as north). For both the passengers and the driver, this provides a sense of the direction in which the vehicle is traveling to reach the destination. Ecolane has incorporated the same directional scheduling practices into Ecolane DRTs' automated scheduling system.

### 5.2.2.2 Secure, reliable and hosted

Ecolane DRT is a web-based, fully hosted solution. This allows Ecolane's partner agencies to enjoy safe and reliable access to the most powerful scheduling solution on the market from any device and any location with an internet connection. Users can access the system using a standard web browser over the same secure, encrypted connections and technology utilized by the largest U.S. banks.

Ecolane DRT is a reliable solution that has maintained a consistent uptime more than 99.99% over the past nine years, allowing Ecolane's customers to enjoy worry-free access and control over their server environment.

### 5.2.2.3 Flexible solution

Ecolane recognizes that every agency operates in slightly different ways and has built a solution that can accommodate both the written and unwritten rules of scheduling. Ecolane DRT can be configured for a wide variety of conditions, allowing the automated scheduling processes to be fine-tuned according to the QoS expectations of each transit agency.

Moreover, Ecolane DRT is a solution that grows and evolves with the changing needs of the agency and its clients. It has been designed in a modular fashion, allowing individual installations to be tailored to an agency's specific needs and to be easily expanded upon as the agency succeeds and grows.

### 5.2.2.4 Compatibility and accessibility

Users can access Ecolane DRT from any internet-enabled device and with any modern web browser. Transportation managers can supervise and respond to events from their desktop workstations when in the office, and from their phones or tablets while on the go.

Ecolane's customers repeatedly cite this benefit as a game changer, enhancing their ability to respond to service disruptions, communicate with clients, and collaborate on solutions in real time.

### 5.2.2.5 Implementation and support

Ecolane views each customer as a long-term partner, right from the beginning of the customer relationship. Ecolane's experienced staff provides step-by-step support through each stage of

the implementation project, including non-software-related activity such as effective change management.

Once an agency has gone live with Ecolane DRT, Ecolane's industry-leading support team takes over, providing continuous support for each customer as well as a 24/7/365 emergency response capability.

In addition to manned support services, Ecolane maintains a comprehensive portal of support content, software documentation, tips and tricks, tutorial and training videos, and more. This material is continually updated and accessible by every partner agency.

## 5.3 Key benefits

Ecolane has amassed in-depth knowledge of both the challenges and goals of current demand response transit agencies. As a result, the Ecolane DRT solution has been designed to provide some key benefits that maximize agency productivity and improve overall service quality.

### 5.3.1 Connecting communities

The Ecolane DRT solution enables agencies to do more with their existing resources. With the increased productivity provided by Ecolane DRT's unique real-time optimization, agencies can better serve the needs of their riders.

Ecolane DRT's automated scheduling also ensures that the results are replicable each day – resulting in more consistent service, better communication with passengers, and in many cases, reduced onboard time for passengers.

Ecolane's flexible service configuration allows agencies to fine-tune the automated scheduling system to meet their own specific goals with highly customized results.

By helping agencies, Ecolane restores community engagement to people who might not otherwise have access or mobility. This is a core belief of our company and one of our driving strategic differentiators.

### 5.3.2 Coordinated Transit

Ecolane DRT's scheduling solution can extend well beyond servicing just a single agency. Ecolane's Coordinated Transit is a powerful all-in-one solution for Non-Emergency Medical Transportation (NEMT) coordinators and paratransit mobility managers.

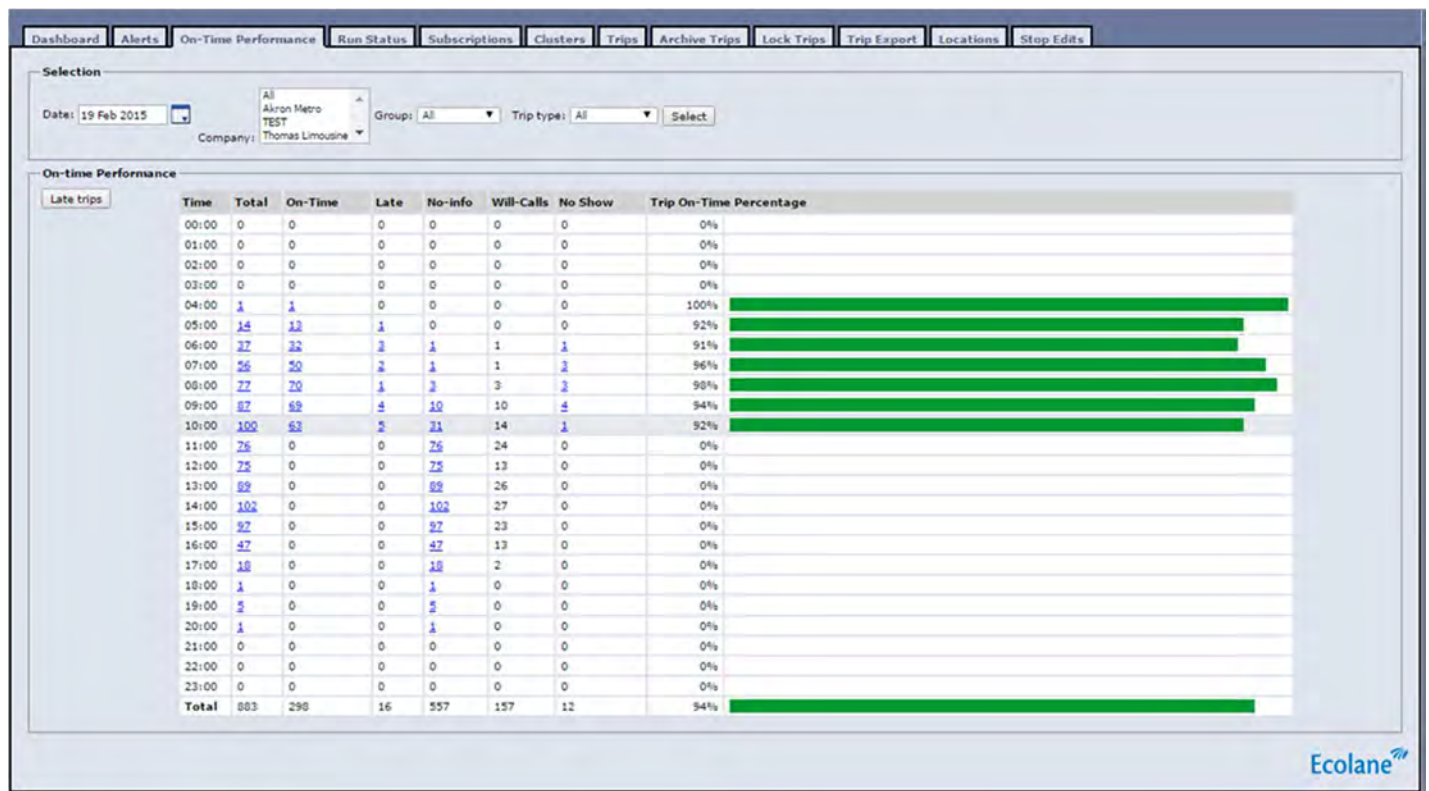
The solution can schedule trips to any number of transportation providers based on the efficient distribution of trips, least-cost scheduling, coordinator-configured preferences, or any combination of these criteria.

The transportation providers can access their trip list through a comprehensive provider portal. They are also able to deploy Ecolane's Mobile Data Tablets (MDT) to use in vehicles to send real-time reconciliation data back to the coordinating agency.

Read more in section 5.4.2 *Coordinated Transit solution*.

### 5.3.3 Real-time monitoring of driver performance

Ecolane DRT's powerful Supervisor user interface enables dispatchers and managers to measure their fleet's performance on the roads in real time. With Ecolane DRT, they have an unprecedented degree of insight and control over the day of service.



**Figure 4. On-Time Performance view in the Ecolane DRT user interface**

Transit agency users have access to on-time performance statistics, fleet utilization data, and a current vehicle Estimated Time of Arrival (ETA) for each stop. All of this information is provided in real time.

Ecolane DRT's proactive service alerts notify dispatchers of any irregularities on the day of service and provide tools to not only resolve the issue but also document the action taken.

### 5.3.4 Extensive reporting

Ecolane DRT's comprehensive reporting tools have been developed to meet the needs of agencies of all sizes. A complete catalog of advanced reports covers standard operational statistics, detailed National Transit Database (NTD) reporting, and customer experience data, as well as an in-depth analysis of scheduling results.

All of these reports can be exported to PDF, Microsoft Excel, Microsoft Word, or even CSV format so that agencies can mine their data with whatever existing tools they use.

In addition to the bundled advanced reports, Ecolane DRT also provides an ad hoc reporting tool, allowing users to build exportable reports and customize CSV-based reporting using the trip export feature.

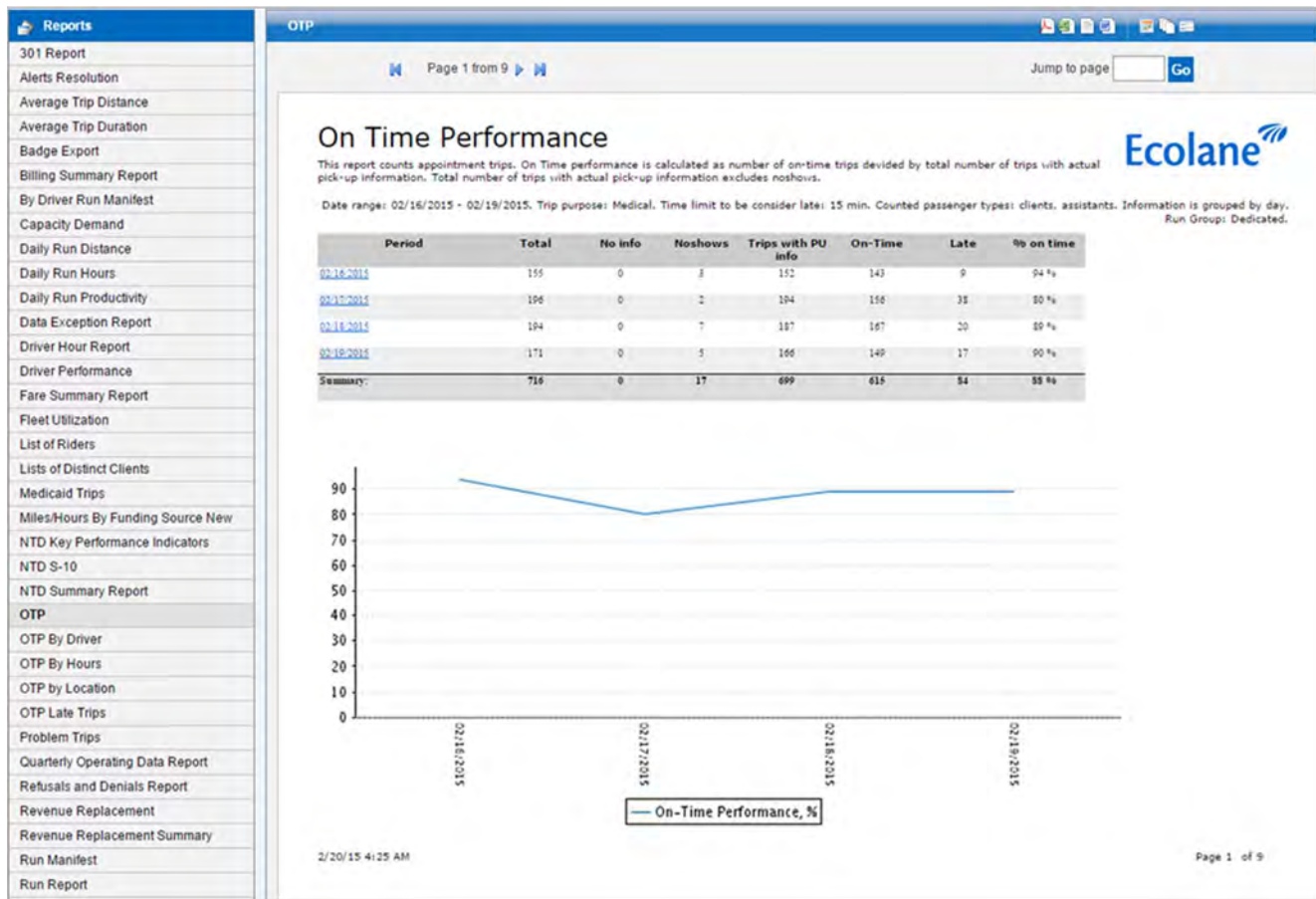


Figure 5. The reporting user interface

### 5.3.5 A natural 'no-I.T.' solution

With Ecolane DRT, transit agencies are provided with a robust, intelligent scheduling system with zero need for local installations or specialized IT resources.

Because the system is a web-based, hosted solution, agencies can avoid having to manage complex Virtual Private Network (VPN) software or to provision expensive servers. The system is accessible from any internet-enabled device using a modern web browser.

No additional investment in IT resources is required, as the Ecolane DRT platform is managed and hosted by the same software experts that develop the product. Ecolane's expert staff handles all software installations and updates, data backups, and server maintenance.

## 5.4 Use cases

Ecolane's scheduling and dispatching solution has been designed to meet the needs of transit agencies of any size or complexity. In the course of developing, building and deploying this solution, a wide variety of use cases have been observed in the field. Some common ones that Ecolane has implemented are presented below.



### 5.4.1 Demand response transportation – a single agency

The most common use case for Ecolane DRT is a single transit agency that schedules and performs its trips. In this model, the transit agency runs the call center for trip reservations and carries out scheduling to its vehicles, which in turn provide the service to passengers.

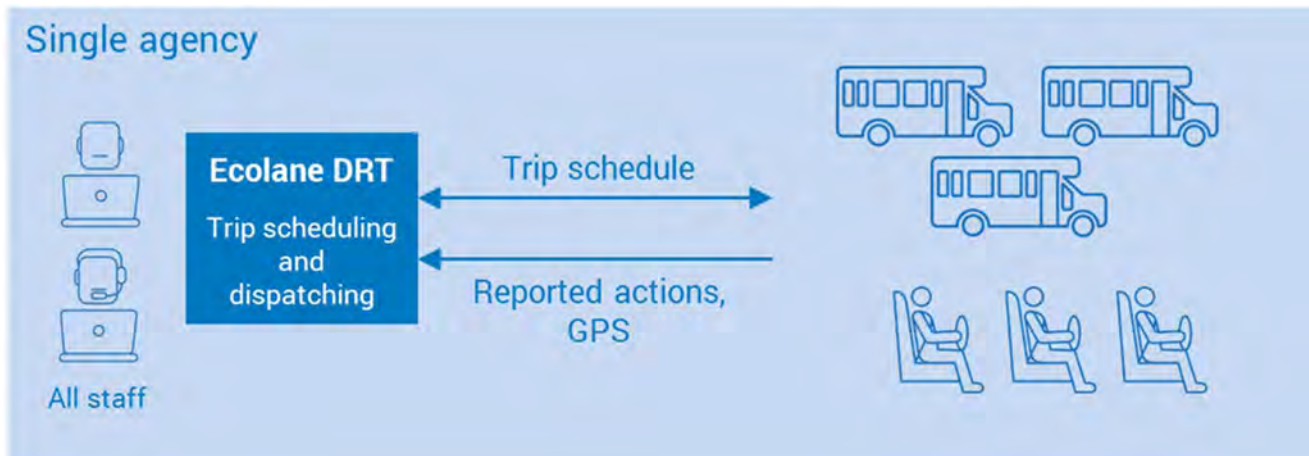


Figure 6. Use case – Single agency

### 5.4.2 Coordinated Transit solution

The Ecolane Coordinated Transit solution covers a wide variety of use cases in which multiple transportation providers are incorporated into the same service. Scheduling to these various providers can be based purely on efficiency gains, on least-cost scheduling based on the provider rate, or on a combination of the two.

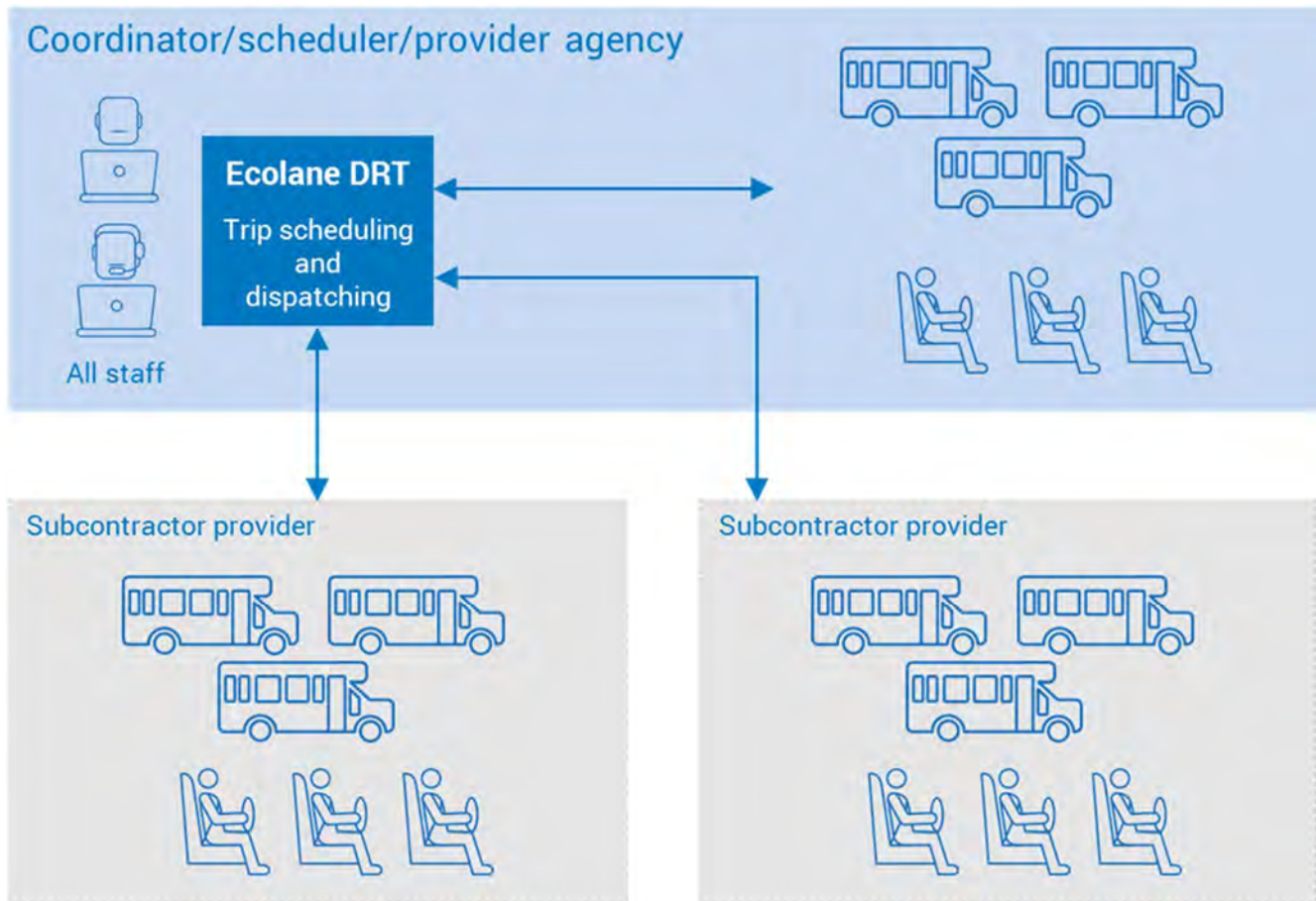
In each of the use cases described below, the central call center is run by a coordinating agency. External transportation providers access their trips through a specialized web portal in which they accept and reject trips, conduct live dispatch activities (when applicable), and carry out billing reconciliation.

#### 5.4.2.1 Coordinator/scheduler/provider

In this use case, the coordinator agency is responsible for running the call center for trip intake, scheduling trips to the transportation providers, and carrying out some of the trips with their vehicles. The remaining trips are distributed among other contracted transportation providers, typically using MDTs for real-time data transfer between the coordinator and the provider.

This is a common case for transit agencies that subcontract large portions of their work, as well as coordinated systems.



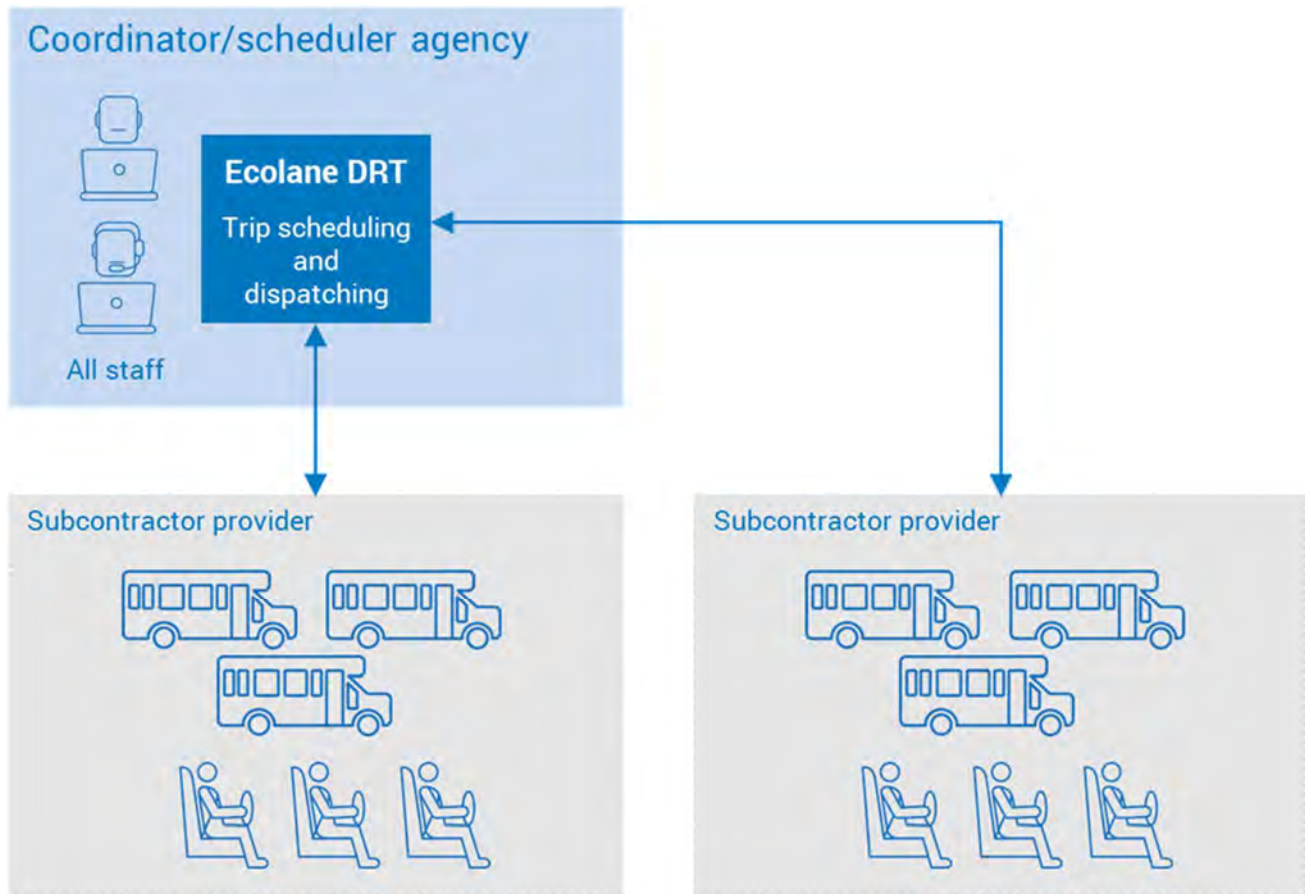


**Figure 7. Use case – Coordinator/scheduler/provider agency**

#### 5.4.2.2 Coordinator/Scheduler

In this use case, the coordinating agency does not carry out any trips with their vehicles, instead relying entirely on contracted transportation providers to provide the service. However, the coordinator is still responsible for the entire trip intake and the scheduling of trips among the providers.

In many cases, the coordinator schedules trips to each provider down to the vehicle level and supply MDTs to a portion of these providers for real-time tracking of their vehicle's performance. The remaining providers conduct all their reconciliation using the provider web portal.



**Figure 8. Use case – Coordinator/scheduler agency**

#### 5.4.2.3 Coordinator only

A use case typical to traditional NEMT brokerages is that the coordinator agency conducts the entire trip intake but has little knowledge of the individual make-up of the fleet in advance of the service.

As a result, the coordinator agency carries out the scheduling but only as far as to identify the correct transportation provider for each trip. This is typically done based on a combination of provider trip limits, provider cost calculations, and any required provider credentialing checks.

In this use case, there is a higher reliance on prompt provider acceptance and rejection of trips. Trips can be optimized in groups, but not about the entire vehicle schedule. In the previous use cases described, trip scheduling at a detailed per-vehicle level makes it easier for providers to identify attractive scheduling offers that may not otherwise be obvious to them. In this use case, scheduling can potentially result in more trip rejections from providers.

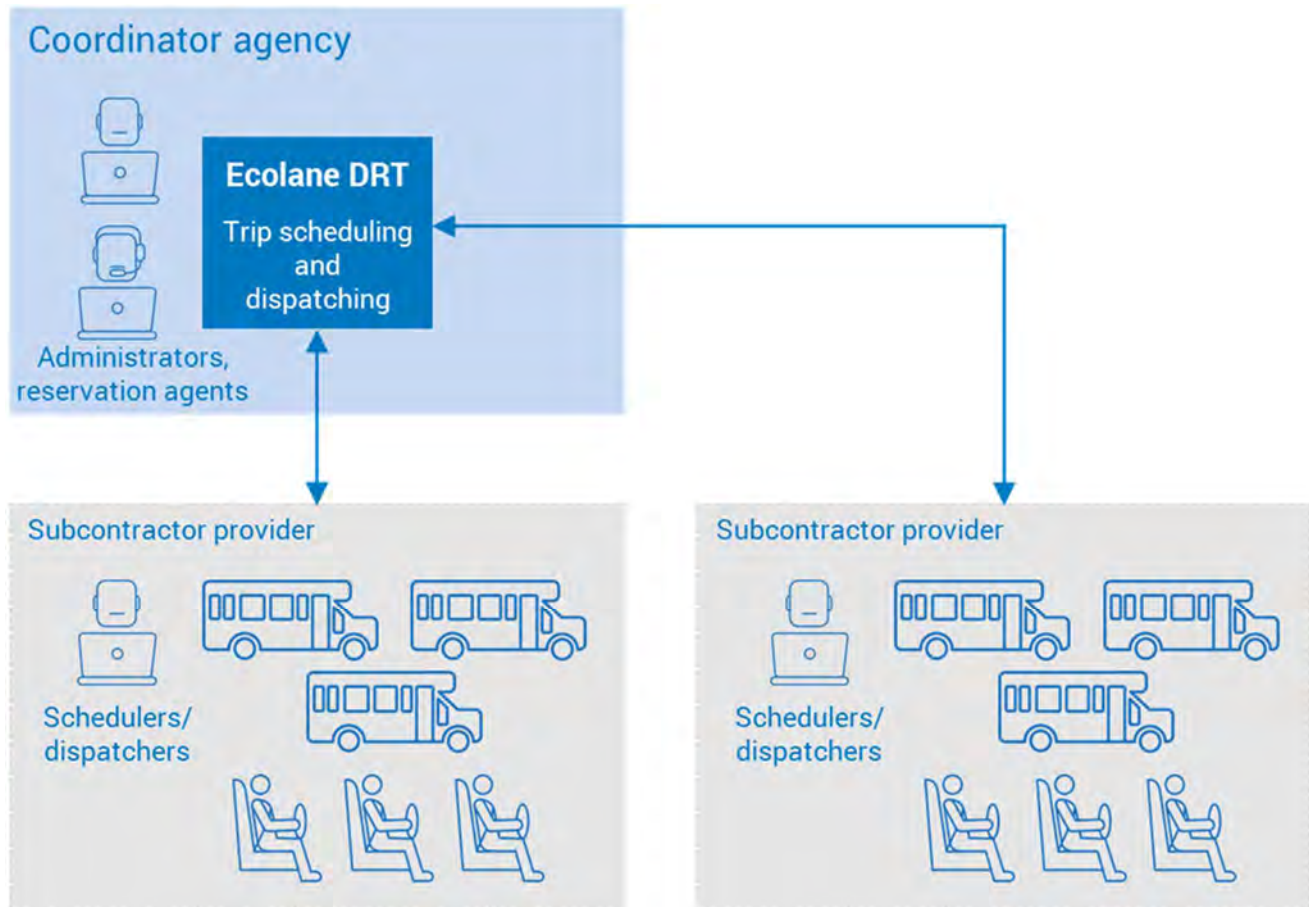


Figure 9. Use case – Coordinator agency

#### 5.4.2.4 Brokerage

Ecolane's brokerage solution builds upon the flexibility of the coordinator model while also incorporating features designed to meet the complex billing needs of brokers. With Ecolane's brokerage solution, brokers can blend their brokerage business seamlessly with additional provider contracts achieve genuinely centralized call intake and scheduling.

Even though a brokerage agency can use Ecolane DRT in any of the coordinator configurations outlined above, the 'Coordinator/scheduler' and 'Coordinator only' are by far the most common models used.

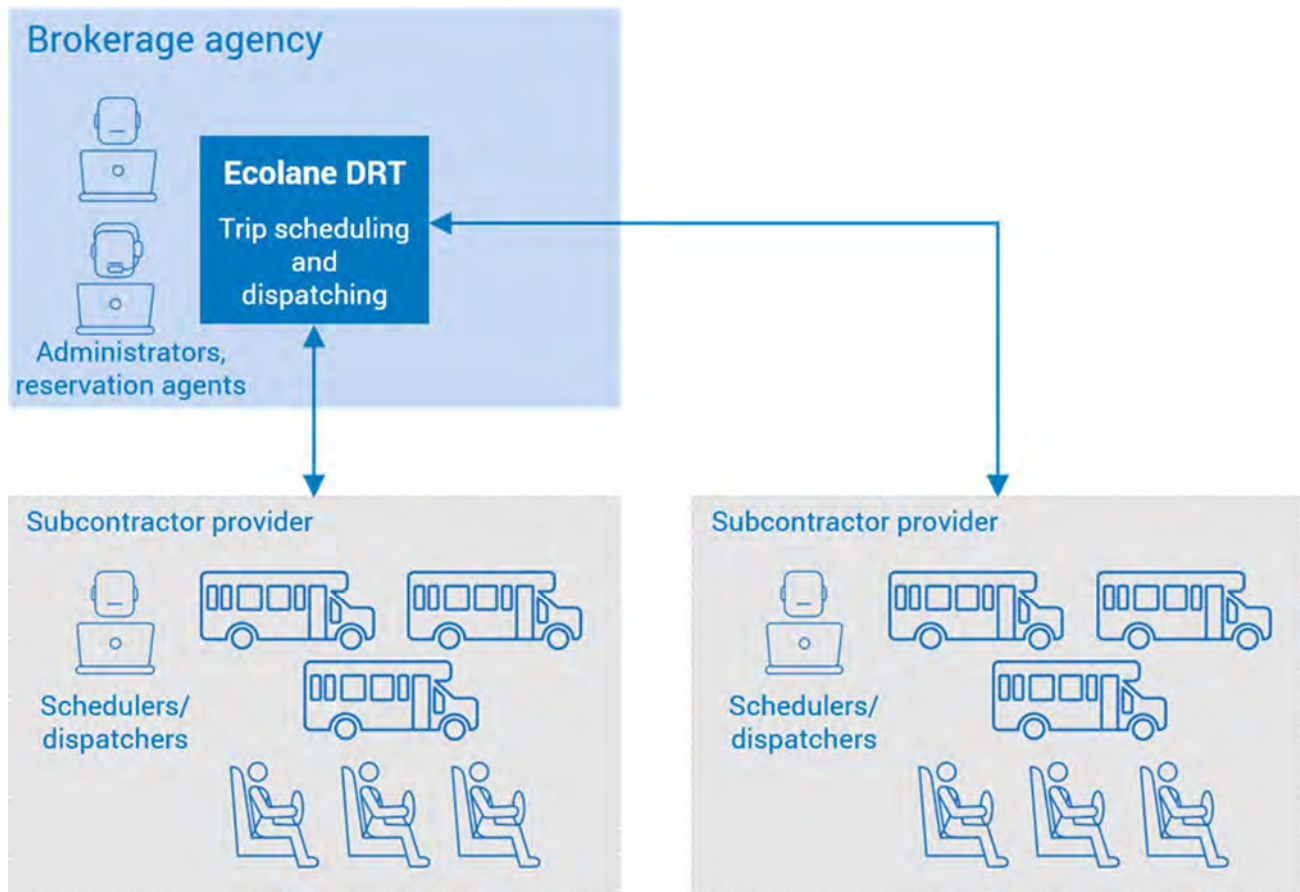


Figure 10. Use case – Brokerage agency

## 5.5 Features

Ecolane incorporates a flexible set of features that can be used to create a scheduling solution tailored to an individual agency's needs.

### 5.5.1 Core features

This chapter describes the core functionality of Ecolane DRT.

#### 5.5.1.1 Automatic scheduling

Ecolane DRT can schedule trips using full automation. After a trip has been booked, no additional scheduling or dispatching actions are needed for the trip to be delivered. With this high level of automation, dispatchers can focus on correcting potential issues proactively, before passengers experience service problems. Ecolane DRT provides easy-to-use tools for supervisory oversight and for making service adjustments as needed.

A significant benefit when using Ecolane DRT is the use of multilevel optimization to gain improvements in scheduling efficiency. With the systems unique scheduling and dispatching processes, automatic schedule optimization can take advantage of multiple optimization possibilities at different critical times while providing a trip.



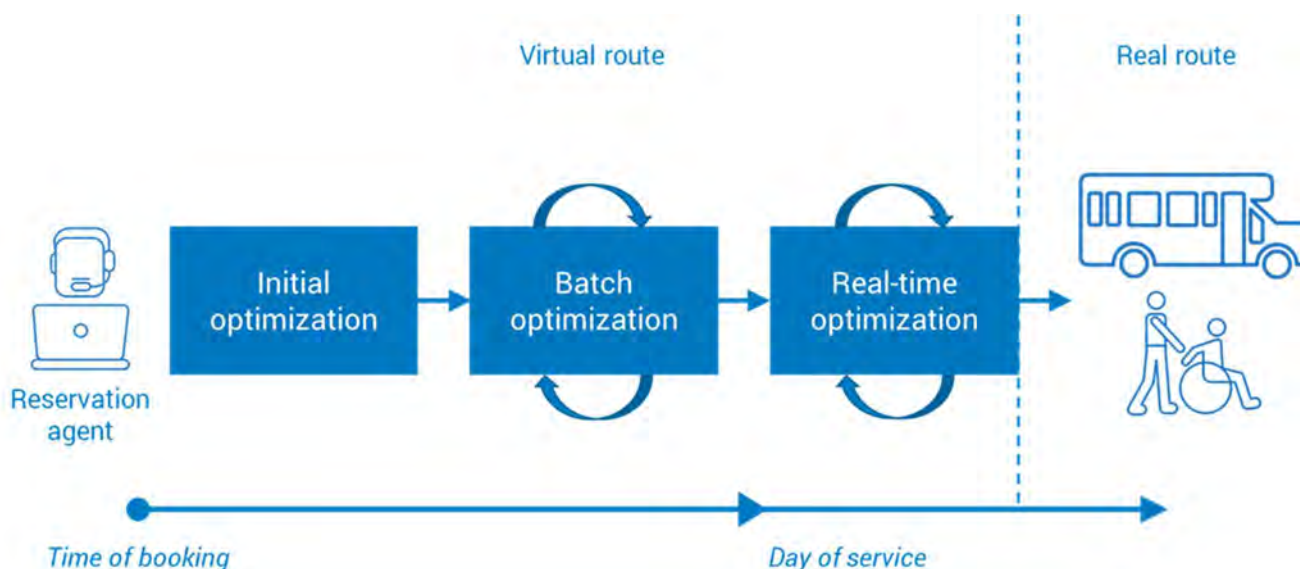
An essential element in Ecolane DRT's scheduling is 'minimal cost scheduling': The scheduling algorithms continually seek a solution that has a minimal 'cost' associated with delivering each trip. This cost does not directly correlate with the financial cost; it is an intricate mix of factors including driving distance, trip duration, the geometry of the solution, and service area characteristics. These cost parameters can be adjusted to fine-tune the scheduling process and, for example, to set preferences for certain types of scheduling solutions according to the transit agency's goals.

All scheduling and routing are based on the installed map data for the service area, which, in turn, is based on street routing and not on legacy triangulation techniques. Combined with advanced traffic pattern modeling, this allows the system to make highly accurate drive time estimates for use in the final manifest.

Read more about multilevel optimization and map and location data in the following sections.

#### 5.5.1.1.1 Multilevel optimization

Ecolane DRT uses three-phase optimization to achieve the best possible scheduling results. Different phases of the transportation provision require slightly different strategies, and the continuous optimization makes use of the best available information in each phase.



**Figure 11. Multi-level optimization**

Unlike competing software solutions, which bind trips to a specific manifest at the beginning of the scheduling process, Ecolane DRT keeps its trips unrestricted. This gives each trip the maximum flexibility to move from one route to another based on the conditions on the day of service, providing a huge advantage for organizations responsible for transit scheduling.

Ecolane DRT's continuous optimization consists of the following phases:

1. *Initial optimization* is carried out at the moment a trip is booked. The scheduling engine evaluates the trip's requirements against the provider and run availability and the other scheduled trips in the system and attempts to slot the trip into a suitable route (a 'cluster'). The reservation agent can then see the scheduling result on the trip confirmation page (or choose from multiple scheduling options, if available).

2. In the *batch optimization* phase, the scheduling engine already has more information available. It can take into account all the other trips that have been booked and scheduled since the initial trip, and if needed, it can move the trip to another cluster or even to another provider to find the best route. Batch optimization can also be configured to repeat at intervals, as needed.

After batch optimization, scheduling has, in principle, found the best possible solution that the algorithms are capable of delivering.

3. The final phase, *real-time optimization*, overcomes the impact of changes on the day of service. These might include changes in traffic flow, variations in passenger behavior (such as loading and unloading time or late boarding), same-day cancellations and no-shows, vehicle breakdowns, or even drivers calling in sick. Real-time optimization also enables transit agencies to provide same-day trips with unparalleled ease and productivity.

Real-time optimization is performed on a trip-by-trip basis and as close as possible to the actual delivery time of each trip. This process is made possible by Ecolane DRT's unique strategy of using 'virtual routes' during the earlier scheduling phases. When a trip's delivery time approaches, real-time optimization moves it from a virtual route to a real one. This ensures optimal scheduling for each trip and makes the best use of gaps left by cancellations and no-shows.

If real-time optimization is not able to find a scheduling solution for a trip, the optimization process is repeated until a route and vehicle are found. This happens in advance before the trip is late, and the system continues to look for solutions even after the dispatcher has been alerted.

#### 5.5.1.1.2 Map and location data

In all of its scheduling and dispatching processes, Ecolane DRT uses street-level routing, which automatically takes into account road types, speed limits, turn restrictions, one-way streets, and barriers (such as rivers). Defining these boundaries using vendor-specific mapping tools is not necessary.

Also, speed factoring takes into account the hour, the day of the week, and the vehicle that the trip is assigned to, as well as whether the driver's skill level is experienced or novice. The result is more accurate manifests.

To schedule trips effectively, Ecolane DRT uses two map sources:

- *TomTom* or *TIGER* data powers the Ecolane DRT scheduling and routing engine, which uses the street segments and map characteristics of TomTom/TIGER to schedule trips to vehicles effectively. Municipal boundaries come standard with both TomTom and TIGER.

Both map data solutions are very accurate and usually require very few additions to start with. To maintain accuracy over time, Ecolane updates the map source annually to address new street segments and city development as part of its annual licensing plan.

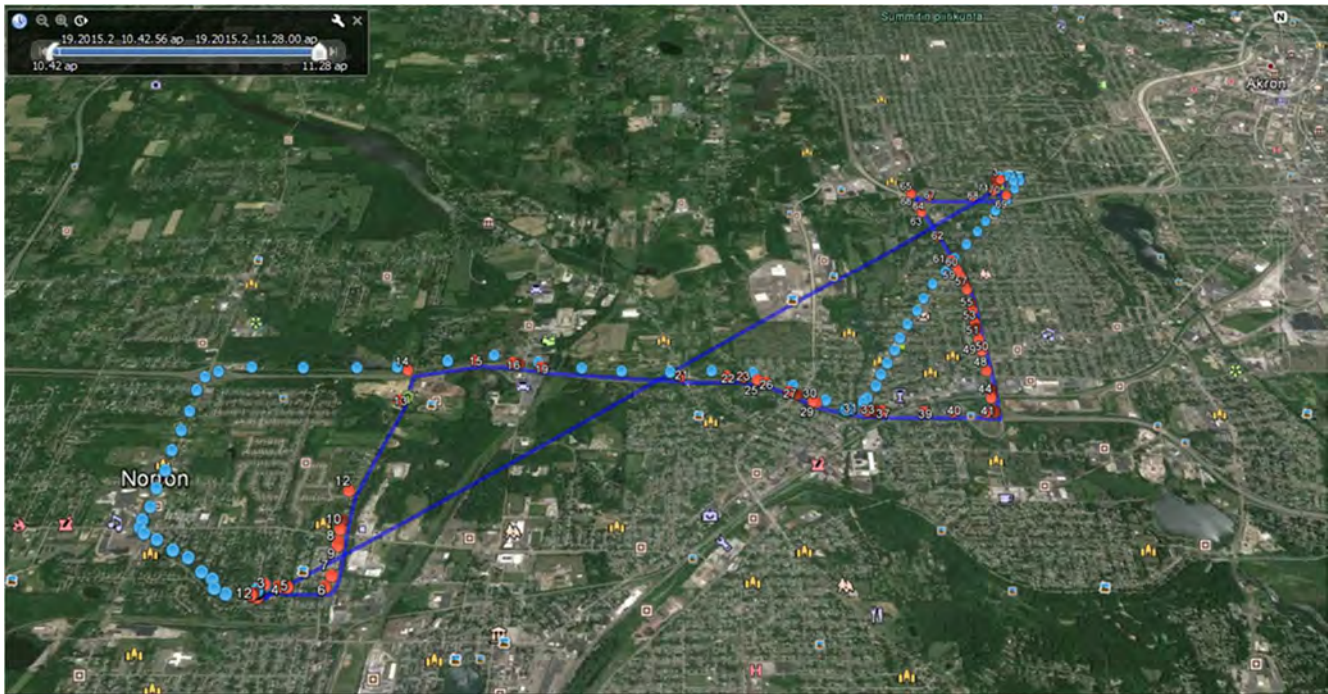
Ecolane DRT also provides sophisticated Geographic Information System (GIS) mapping and location administration tools. Users can manually geo-code addresses or entire street segments and create system-wide Points of Interest (POI) when needed.

- *Google Earth* is used to display location, route, and trip data in Google Earth's visually rich Keyhole Markup Language (KML) format.

As Ecolane DRT collects data from the MDT devices in vehicles, users can also view real-time data, such as stop arrivals, departures, and no-shows, on maps. This simplifies tracking and



enhances an agency's ability to make dispatching decisions and manage their vehicles. Users can view maps from multiple angles and zoom levels.



**Figure 12. An example of a leg map on Google Earth**

With Ecolane DRT's location administration, users can manually adjust the attributes of each street segment, including street number ranges, city, state, zip code, and county. Ecolane support teams can also help with the fine-tuning of individual speeds or traffic congestion factors. This is useful for achieving more accurate scheduling times or for making segments unavailable (for example, if a bridge is closed due to construction or repairs).

When users enter address information for a new trip reservation, Ecolane DRT autocompletes the addressing based on the existing map data in the system. The system also validates the address with a geocoding check against the internal GIS database.

#### 5.5.1.1.3 Service areas for providers

Service areas can be set up within Google Earth by the agency or with Ecolane's help to indicate to the scheduling system where providers operate. Ecolane's Professional Services team will train agency staff how to set up service areas, so they can manage them at the agency level as needed.

Service areas can also be set up, so they are based upon a funding source as well as being available for only certain times of the day or week. Parameters for this would be set within the Administration User Interface (UI) of the software.

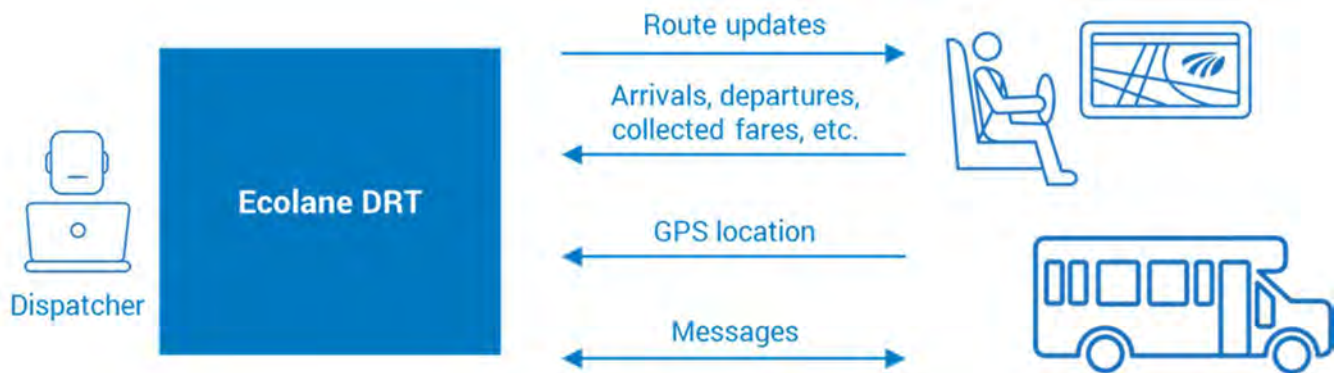
#### 5.5.1.2 Mobile Data Tablets in vehicles

The benefits of incorporating a Mobile Data Tablet (MDT) or an Automatic Vehicle Location (AVL) device with Ecolane DRT are substantial. Ecolane offers the cost-effective Ecolane MDT

solution but supports seamless integration with multiple other manufacturers' devices as well. Vehicles without an MDT can also be used alongside those with an MDT/AVL device on board.

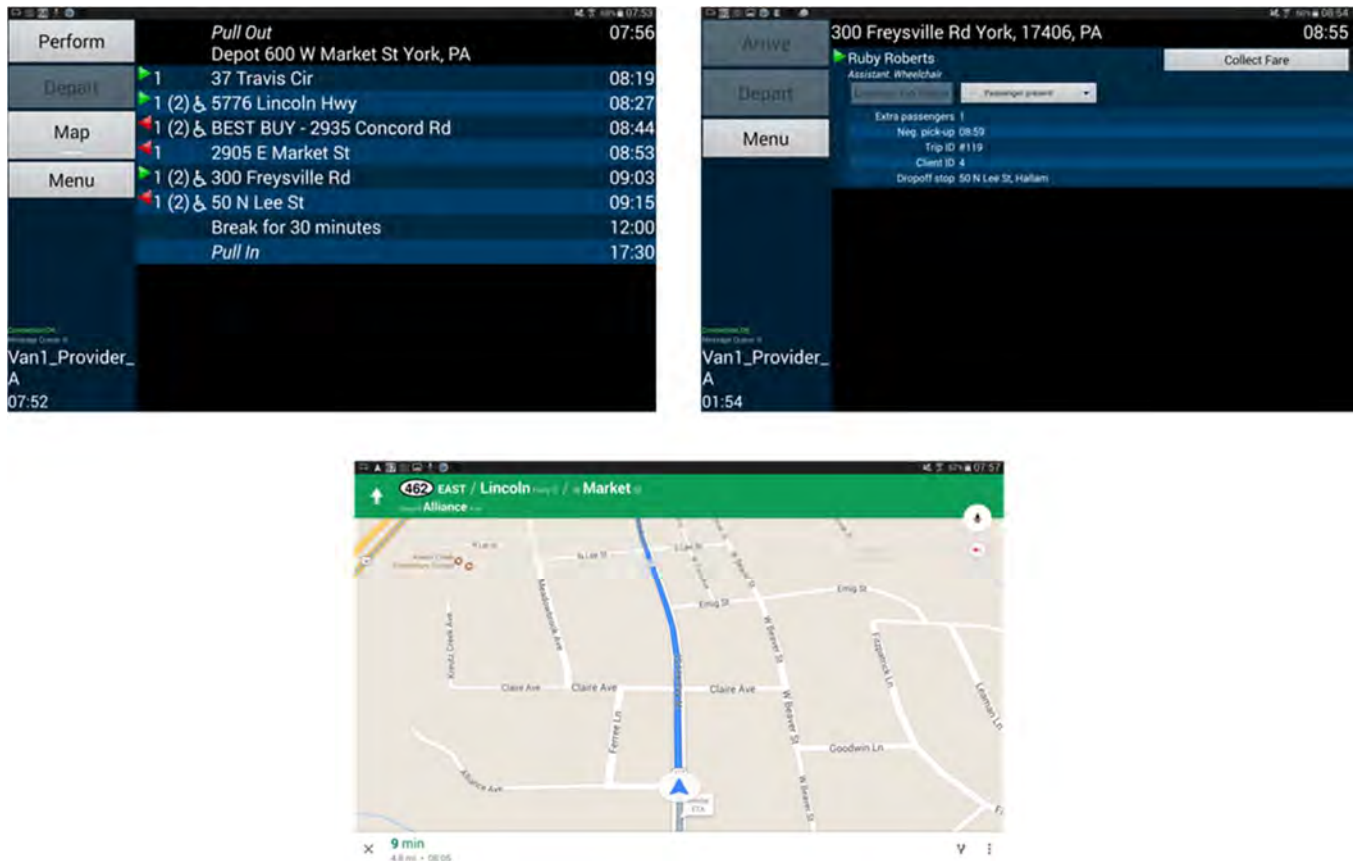
Through communication with Ecolane DRT, the MDT/AVL devices provide drivers with an up-to-date run manifest, without any need for voice communication with dispatch. Drivers report actions such as arrivals, departures, and collected fares directly through the device.

This continuous, two-way communication improves safety, data accuracy, customer service, and productivity, while substantially reducing the time required by dispatch staff for data entry and manifest reconciliation.



**Figure 13. Communication between Ecolane DRT and MDT**

Ecolane DRT's MDT/AVL solution uses GPS to track vehicle activity at all times, providing real-time vehicle location information to dispatchers and increasing scheduling efficiency. For example, a trip can be automatically scheduled and dispatched to the closest vehicle, without having to view the vehicle on the map.



**Figure 14. Stoplist, client screen, and turn-by-turn navigation in Ecolane MDT**

Ecolane's own MDT software solution provides all the benefits of alternative MDT/AVL functionality at a fraction of the cost of other devices. The Ecolane MDT software runs on off-the-shelf Android touchscreen tablet devices with built-in GPS and data connectivity.

The Ecolane MDT device can be easily secured to the dashboard or windshield but is not hard-mounted, making it easy to move from one vehicle to another. Drivers can comfortably take the MDT with them and stay connected if they need to leave the vehicle (for example, during a break).

Wiring, hardware updates, and training are all simple and straightforward with Ecolane MDT. The user interface is simple, fast, and intuitive to operate, and it has been successfully used in hundreds of vehicles and by thousands of drivers of all skill levels and ages.

### 5.5.1.3 Real-time automated dispatching and monitoring

Dispatching in Ecolane DRT is almost completely automated. The system makes 99 percent of all dispatching decisions on its own, resulting in better scheduling and improved on-time performance on the street. With a highly automated process and real-time data readily available, dispatchers can focus on proactive problem solving instead of reactive 'firefighting' while maintaining the ability to dispatch trips if needed manually.



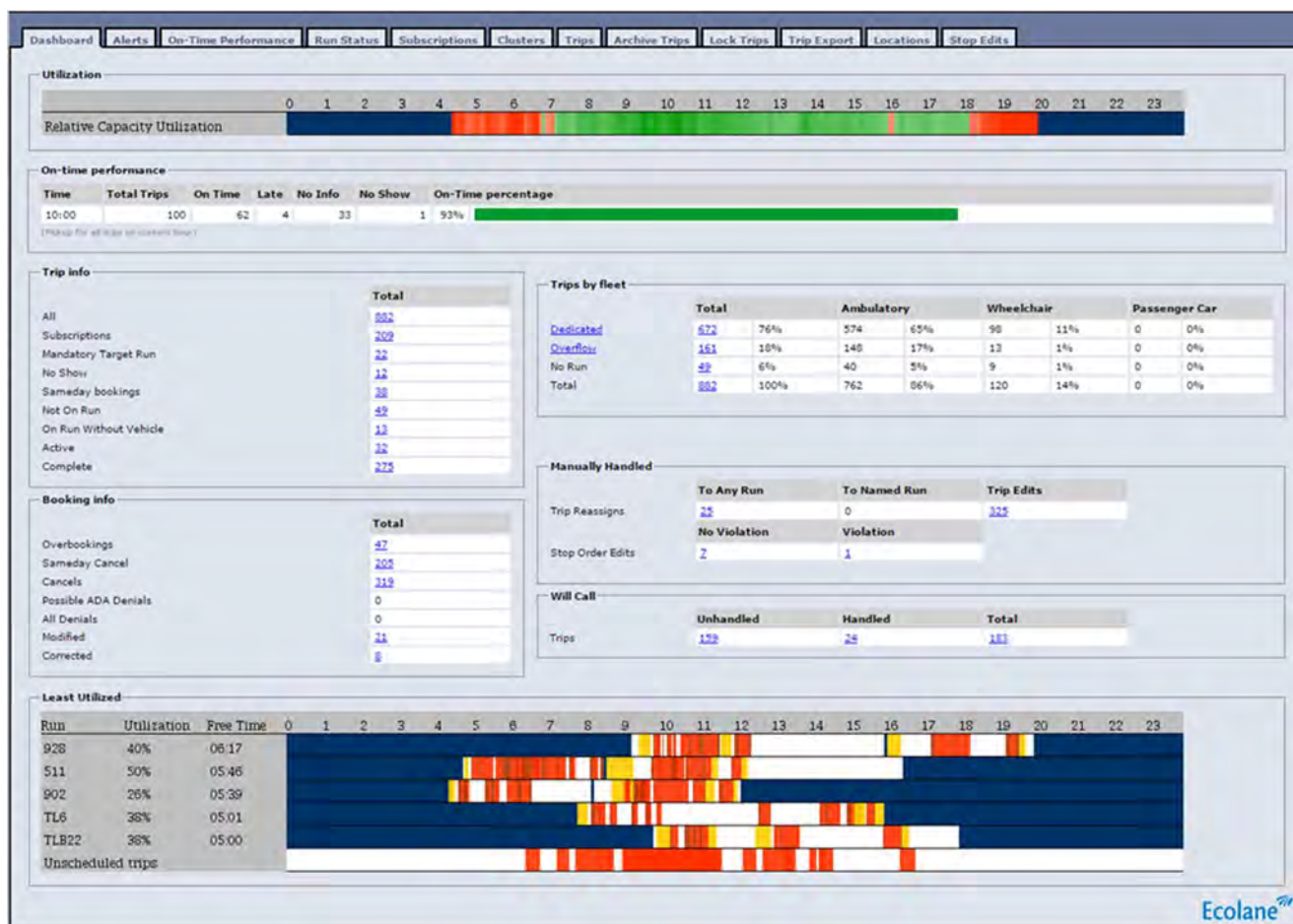


Figure 15. Ecolane DRT Dashboard with real-time data on service status

Dispatching follows configurable service rules to determine how to assign trips to vehicles. These rules take into account available vehicle capacity, the priority of different transportation fleets, and dispatching time (the time when a group of trips needs to be dispatched). Dispatching also uses the real-time vehicle data collected through MDTs, such as arrivals at and departures from stops.

Ecolane DRT's Supervisor user interface provides dispatchers with real-time service data, offering decision-making support for scheduling and dispatching actions.

<b>Dashboard</b>	The Dashboard provides users with a summary view of the current day's operations. It provides real-time data such as capacity utilization, current hour on-time performance, least utilized vehicles, and a count of trips by status and by the fleet.
<b>Alerts</b>	Ecolane DRT's unique alert system enables dispatchers to work on potential issues and problems that require immediate attention.  Alerts are generated, for example, for no-shows; unhandled will-call trips; trips that are at risk of becoming missed or late; and drivers who are late to the

	<p>day's first stop, spend a longer time at a stop than estimated or report a stop too far away from the actual stop location.</p> <p>To track how issues have been addressed, users can resolve and comment alerts. Ecolane DRT provides reports for monitoring response times to alerts and how alerts are being generated in the system (for example, to determine possible patterns or problem areas).</p>
<b>Real-time OTP data</b>	Detailed, real-time on-time performance data is available for monitoring driver performance. This allows dispatchers and managers to immediately see how effectively the service is meeting promised delivery times and to review late trips.
<b>Run Status</b>	<p>In Run Status, dispatchers can view information on different transportation providers' runs, and details on what has occurred on the run since the start of the work shift.</p> <p>Dispatchers can view, for example, a run's current vehicle and driver, pull-out and pull-in times, schedule, assigned trips, dispatch events, and alerts. They can also adjust the run's availability times if needed.</p>
<b>Vehicle activity</b>	<p>Ecolane DRT provides powerful tools for monitoring and analyzing vehicle activity using a map based on GPS data.</p> <p>Dispatchers can view activities such as the vehicle's real-time and historical location; the login, logout, pull-out, pull-in, and break locations; pick-up and drop-off stops; and locations where route updates were received. This makes it easy to answer 'where's my ride' calls, for example.</p>

With the real-time data, alerts and manual scheduling features available in Ecolane DRT, schedulers and dispatchers can make informed decisions when they need to take manual actions regarding stops, trips, vehicles, and manifests. The system provides multiple tools for changing the fully automated scheduling results when necessary, and all manual changes are tracked for review and evaluation.

Dispatchers can do the following:

<b>Edit stop order</b>	Dispatchers can edit the order of stops for routes (after they have moved from virtual to real status). If the change violates service quality rules, the dispatcher is notified and must confirm the action before proceeding.
<b>Reassign trips</b>	Dispatchers can reassign a trip to another run and vehicle. If the change violates scheduled route times, the dispatcher is notified and needs to confirm the action before proceeding.
<b>Switch the vehicles assigned to runs</b>	Dispatchers can reassign a run to another vehicle. They can view each vehicle's current location and the location of scheduled stops on a map.
<b>Lock trips</b>	Dispatchers can lock trips in place to prevent the automated optimization processes from making any changes, as that might in some situations cause problems for drivers. This is useful, for example, for covering time periods when transportation service is provided but no dispatchers are present.

<b>Trim daily start times</b>	Dispatchers can synchronize the day's run availability with the pull-out time so that the pull-out time is adjusted based on the first assigned trip. Management can use this to trim daily start times, enabling supervisors to tell drivers precisely what time to arrive for their work shift, which reduces non-revenue hours and ultimately expenses.
<b>Handle will-call trips</b>	Dispatchers can handle will-calls trips as clients call in to confirm they are ready to be picked up. The system automatically schedules and dispatches the trip, but the dispatcher can take manual action if it is necessary for the trip to be dispatched and delivered on time.

Ecolane DRT supports messaging between dispatchers and drivers. Dispatchers can send messages to a single driver or to a group of drivers at one time. They can also view received messages directly on the alerts page of the Supervisor user interface. Drivers receive messages directly on the MDT screen. Dispatchers and drivers can send both free-form messages and configurable pre-written messages from a list.

#### 5.5.1.4 Provider, run, vehicle and driver management

The Ecolane DRT Administration user interface allows users to create and manage comprehensive information on transportation providers, including a provider's contact information, runs and run availability, vehicles and their seating capacity, and driver accounts.

Ecolane supports multiple transportation provider types such as professional transportation providers, external fixed route transportation providers, and independent providers who provide personal transportation for reimbursement.

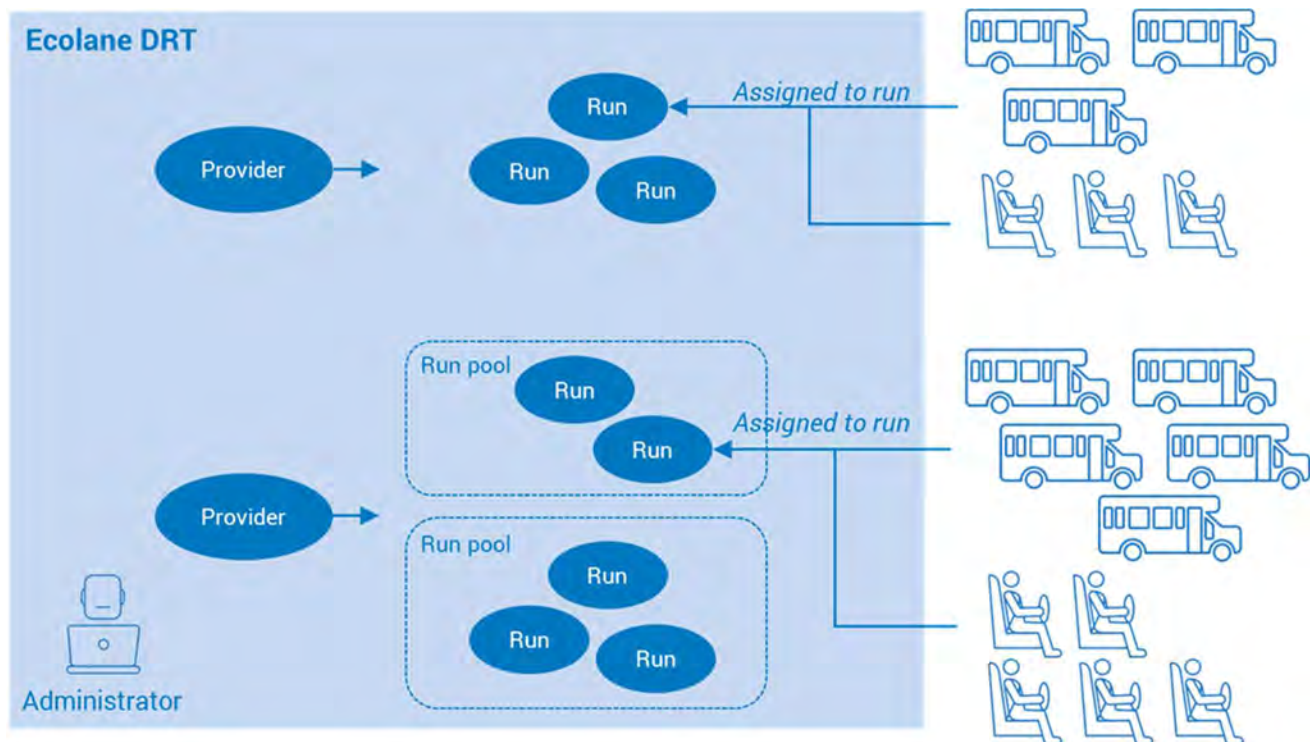
Ecolane DRT assigns individual trips to providers as part of its automated scheduling processes. For added control over provider assignments, it is also possible to associate default providers that will be used based on the trip's funding source and to configure individual providers only to receive trips that users manually assign to them.

Runs provide the outline of how and when transportation service is provided.

- Runs define the service days and hours, seating capacity available (determined by the assigned vehicle), allowed service area, and so on. When runs have been established, vehicles and drivers can be assigned and unassigned to runs as needed.
- In the case of a large fleet, runs can be broken into 'run pools,' which provide dispatchers with more manageable views of the fleet.
- Ecolane DRT's automated processes use the run information to schedule and dispatch trips to vehicles. Ecolane DRT also provides tools for users to make manual changes when needed, for example, to reassign a trip to another provider or run, or to adjust the daily run availability. Additionally, users can lock a trip to a run (or runs) using target runs, which allows manual override of scheduling results.

Figure 16 illustrates the big picture of how provider information is managed in the system.





**Figure 16. Provider runs, and their assigned vehicles and drivers**

Ecolane DRT provides straightforward tools for managing fleets and individual vehicles, and for tracking maintenance work, accidents and road calls.

- The characteristics of individual vehicles are recorded, including the vehicle's make, model and license number, vehicle capacity, insurance information, and whether or not the vehicle is using an MDT device. Custom fields can be easily added.
- Users can add new vehicles even on the day of service and dispatch them to service by assigning them to a run.
- To maintain accurate scheduling and excellent customer service, it is essential to observe the restrictions posed by vehicle space types, and Ecolane DRT takes this into account. In a typical paratransit vehicle, wheelchairs are arranged in a line, and the last wheelchair loaded must be unloaded first. This means trips are best scheduled so that the wheelchair unloading order is the reverse of the loading order.

Ecolane DRT's scheduling process applies an extra cost to solutions that deviate from this, keeping the loading and unloading order ideal for each trip. The deviation is allowed if other benefits, such as reduced mileage, exceed the cost.

Driver accounts record each vehicle operator's details and can also be used to track drivers' training history.

- A driver's account specifies the driver's availability for work, skill level, provider company, hire and termination date, contact information, emergency contact information, and driver's license. Custom fields can be easily added.
- A driver's account can also track the individual's qualifications and certifications such as the license expiration date and the training they have attended, as well as other personnel-related information.
- Management can remotely log a driver out of the MDT if they are logged into a vehicle where they should not be.

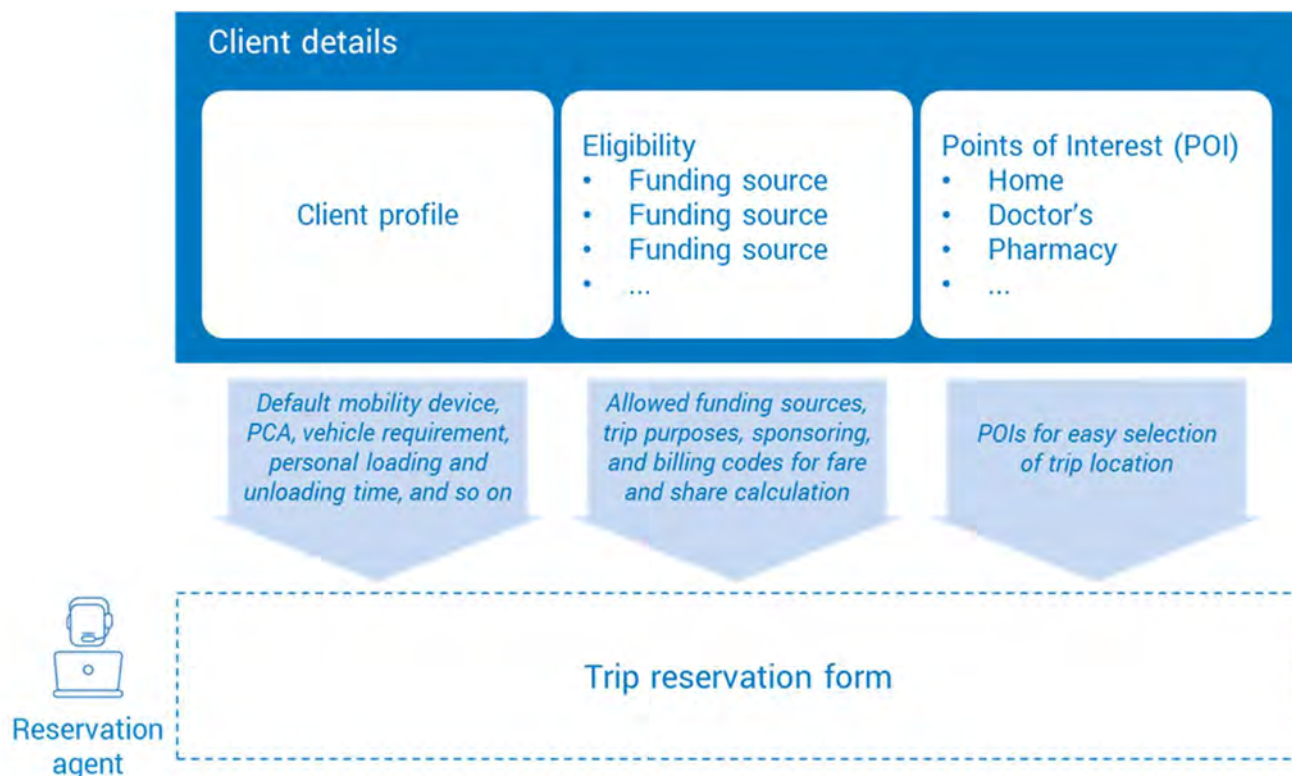
### 5.5.1.5 Client management

In Ecolane DRT, information on clients (the passengers registered to use the agency's services) is easy to enter and intuitive to manage. Reservation agents can edit and view a client's profile, funding eligibility, and location details, as well as the client's complete travel history, grouped into current, past, and future trips.

To begin booking trips for a client, it is sufficient to merely define the client's essential profile details (such as contact information) and their eligibility for funding.

Providing additional information speeds up the reservation process, as the new order form automatically shows default values from the client's profile, including mobility device information or details such as whether or not the client travels with a Personal Care Assistant (PCA). The client's profile also identifies whether they can receive text message updates about estimated pick-up times.

*Figure 17* illustrates how information defined in the client's details is used for trip reservations.



**Figure 17. Client details used in trip reservations**

To track funding eligibility, each client's profile contains data such as the application submission, certification, eligibility, appeal, review, and renewal dates, and agencies can also upload certifications and applications to the profile. In a client's profile, each funding source eligibility specifies the client's allowed trip purposes and whether sponsoring is allowed.

Ecolane DRT uses this information to enforce trip eligibility for the client, calculate the trip's fare, and provide accurate reporting per funding source. Custom fields can be added to the eligibility details to meet transit agencies' needs.

Each client can have an unlimited number of personal Points of Interest (POI): locations to mark their popular destinations. With POIs, the reservation agent can fill in the details for a pick-up or drop-off locations with a single mouse click. A client POI can also contain additional information for the driver or reservation agent. For example, a client traveling in a wheelchair may want to provide the driver with loading instructions for their home address.

Suspending a client's service is a straightforward process. The user defines the suspension period, and Ecolane DRT does not allow trips to be booked during that time. It is also possible to suspend a client's eligibility for a single funding source.

#### 5.5.1.5.1 Prepaid balance

With the prepaid balance feature, agencies can offer their clients the option to pay trip fares from their balance. The fares of both the client and their accompanying passengers can be paid from the client's balance, and it is also possible to use the balance to pay a part of the fare. To provide flexibility for payments, a negative balance is allowed.

Is it also possible for agencies to use the client balance feature to handle IOU cases, where the client does not have other (sufficient) means of payment when boarding the vehicle.

A client's prepaid balance is managed as part of the client's account. Full transaction history is available for keeping track of changes to the balance, whether these be fare payments for trips, balance deposits (or deductions) made by agency users, or corrections to the balance-paid fare amounts in archived trips.

### 5.5.1.6 Trip reservations

Ecolane DRT provides reservation agents with a straightforward and intuitive interface for booking trips. They can search a client by name or social security number, and start booking a trip quickly and efficiently, whether it is a one-off trip or a recurring trip subscription.

The reservation process is streamlined to be as efficient as possible. The reservation form automatically shows a client's default values, such as their mobility device, fare information, or preferred provider. Defining the trip locations is quick with the help of the client's POIs, commonly used previous locations, and the address autocomplete functionality.

Simple shortcuts are provided for creating return trips or subscriptions, copying earlier trips from the client's travel history, and copying subscriptions.

The trip confirmation page allows the reservation agent to choose from the scheduling options offered, or, if needed, to revise the trip requirements or even deny the trip. To reduce duplicate or overlapping reservations, the confirmation page also shows any bookings that the client may already have for the same day.

With the same ease of use, reservation agents can book both future and same-day trip requests, with immediate feedback on scheduling results.

Ecolane DRT supports the varying preferences clients have for their travel schedules and destinations. Whether a client has an appointment to make, needs a multi-leg trip, can only confirm the exact pick-up time right before they travel (a 'will-call' trip), or only wants to make a quick stop and then ride back on the same vehicle – the reservation agent chooses a suitable trip setting, and Ecolane DRT's automated scheduling calculates a trip schedule that meets these needs.

For subscriptions (standing orders), Ecolane DRT provides flexible recurrence patterns including date ranges, days of the week, weeks of the month, or specific dates of each month. Ecolane DRT automatically generates trips from the subscription in advance according to the agency's operational policies. For example, some agencies only allow bookings to be made two weeks in advance.

Ecolane DRT also supports trip imports and bookings via Self-Service or Alexa by individual clients (see Sections 5.5.2.1 *Center management*, 5.5.2.2 *Self-Service web bookings for clients*, 5.5.2.3 *Mobile App*, 5.5.2.4 *Alexa integration*, and 5.5.2.13 *Order import*).

### 5.5.1.7 Trip groups

Grouping trips together efficiently are vital for any agency, and Ecolane DRT's advanced scheduling algorithm builds many of these trip groups automatically.

However, cases arise where an agency has a particular group of people with specific needs that go above and beyond the standard scheduling rules of a transportation agency. For these cases, Ecolane DRT provides powerful tools for users to create specialized group trips and define unique service rules to meet the group's needs.

When users create trip groups manually, they can specify the pick-up and drop-off order for the trips in the group. If needed, they can define a group as private, which means that no additional trips can be scheduled to the vehicle while the group is on the vehicle. If necessary, a trip group can also have a group monitor: a person assigned to ride with the group.

All this allows agencies to create consistent scheduling templates for those clients who require special exceptions to the standard service rules.

### 5.5.1.8 Funding and billing management

Ecolane DRT has a configurable billing module for calculating trip fares, transportation provider costs, and funding source costs.

Each rule defined in the billing module can be used as a building block to construct any portion of the billing structure. Rules can be shared and reused between faring, billing of funding sources, and provider rates. The billing module provides flexibility for setting up calculations to manage all of the billing rules. Before and during implementation, Ecolane works closely with the transit agency's staff to ensure that the billing module is accurately configured.

The billing module supports any combination of the following:

Flat fee	No-show cost (yes/no, percentage of full)
Flat fee with discount by age	Mobility device cost
Distance-based	Funding source cost
Duration-based	Shared miles
Zone-based	Shared hours
Setting cost for transportation	Transportation provider based
Pull-out cost	Billing codes
Per trip cost	Fare type 'billed'
Client (yes/no, percentage of full)	Fare type 'balance'
Additional passengers (yes/no, percentage of full)	

### 5.5.1.9 Flexible service configuration

Ecolane DRT provides extensive possibilities for service configuration:

- Service configuration parameters

Ecolane DRT has a comprehensive and flexible set of parameters for configuring and fine-tuning service behavior. Default negotiation windows for calculating trip times and default loading/unloading times are just a couple examples. This provides the most efficient and effective scheduling and dispatching to match the transit agency's service requirements.

Before and during implementation, Ecolane works closely with the agency to accurately set up service configurations. To allow flexibility for the changing conditions of transit service provisioning, that cooperation is continued post go-live.

- Quality of Service rules

Ecolane DRT automatically adheres to the agency's scheduling rules defined in the system, such as the maximum onboard time, on-time windows, and capacity restrictions. However, some flexibility is provided to achieve optimal scheduling.



Staff schedulers can bend service rules slightly to gain efficiency or improve customer service. This is natural and necessary, as schedulers are not able to estimate drive times from one location to another down to the accuracy of seconds.

The system’s automated scheduling uses accurately estimated drive times, loading and unloading times, and so on, and slight bending of these estimates can be challenging. However, Ecolane DRT’s scheduling intelligence can ‘mimic’ the staff scheduler by allowing service rules to be bent if the benefits are significant enough.

Note!	Ecolane DRT makes an obvious distinction between scheduling solutions that are by the service rules defined in the system and solutions that are not. Ecolane DRT only seeks solutions outside of the service rules as determined by the transit system’s management team if these types of solutions have been permitted in the first place.
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- Service area administration  
Ecolane DRT provides flexible tools for setting up service areas and then restricting the use of providers, runs, and funding sources to a specific area (or areas) as needed. The system can be configured to show a warning message at the time of booking or even deny the booking if the trip’s requirements conflict with service area restrictions.

5.5.1.10 User administration

Ecolane DRT provides secured access control based on roles and permissions. All users are required to have a username and password to access Ecolane DRT.

Figure 18 illustrates Ecolane DRT’s user access at a high level.

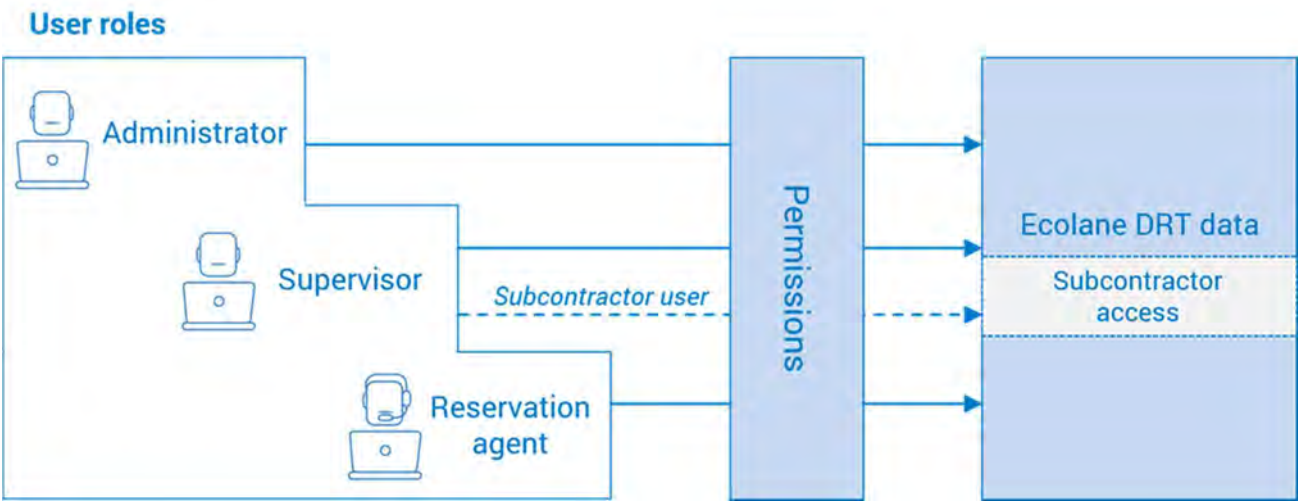


Figure 18. User access to Ecolane DRT

Each user is assigned the role of an administrator, supervisor, or reservation agent, and this determines which parts of the system they can access. Their access can be further customized using permissions, which can enable or disable specific features and functionalities.



Additionally, users can be associated with a subcontractor provider or with funding sources. Subcontractor users typically have more limited access to the system by default, and their use of the software can be restricted to only their own provider's information. Funding source users have even more limited access, covering just the trip, on-time performance, and reporting data for the funding sources associated with their account.

User access can only be managed by administrator users with sufficient permissions to do so.

### 5.5.1.11 Event log and change audit history

Ecolane DRT maintains extensive event logs and provides an audit trail for user-initiated changes. These include:

- Client profile change history/audit trail

Ecolane DRT keeps a detailed changelog of every alteration made to a client profile. Authorized users can see when a change was made, which user initiated the change, what the previous value of a field was, and what value it was ultimately changed to.

- Trip change history/audit trail

Ecolane DRT logs all changes made to a trip as events in the database. All user-initiated events log the username associated with the change. The change history can be viewed when viewing the trip.

- Dispatching and scheduling history/audit trail

As with trips, Ecolane DRT logs detailed events on every cluster of trips. The change history tracks everything that the system does during the scheduling process, as well as user-initiated actions on the cluster.

- MDT logs/changes

As with trips, Ecolane DRT and the MDT log everything that a driver does while they are performing trips. Odometer logs, GPS, messages sent to/from dispatch, vehicle speeds, trip perform times and locations, etc. are all time-stamped and recorded by the MDT and sent back in real-time to Ecolane DRT and archived automatically for reporting as needed by the agency.

### 5.5.1.12 Reporting

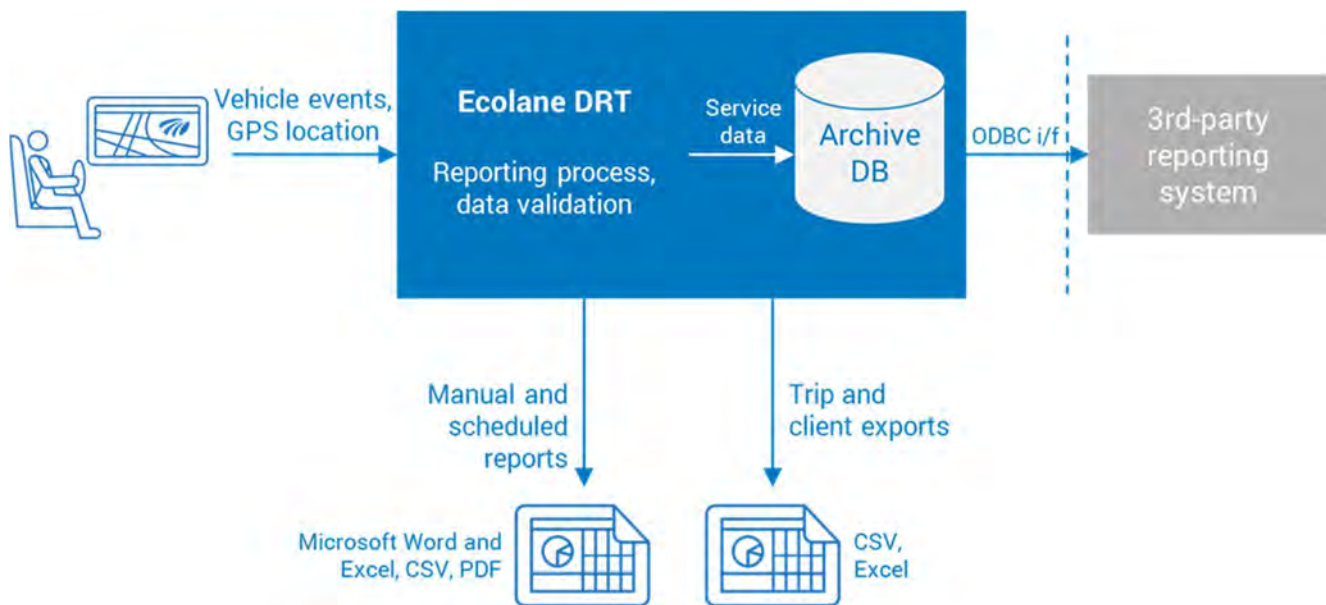
Ecolane DRT's reporting meets the highest standards for reliability, ease-of-use, customization, and expansion.

The reporting engine collects all the necessary data concerning trip reservations, scheduling, dispatching, service delivery, and manual trip edits. All service data is stored in the archive database and kept permanently accessible for reporting and audits.

Ecolane DRT's reporting fulfills multiple needs for billing and invoicing, provides access to critical indicators and trends, and offers analysis of service performance and processes to support continuous improvement. This allows transit agencies to make full use of all the information gained throughout the service operation, and to leverage the skills and knowledge throughout their organization to better forecast and plan.

Ecolane DRT's reporting also facilitates local, state and federal reporting requirements. Ecolane DRT supports complete National Transit Database (NTD) report collection and development requirements.

Figure 19 provides a high-level view of Ecolane DRT's reporting.



**Figure 19. Reporting in Ecolane DRT**

Like the Ecolane DRT system itself, its reporting functionality is entirely web-based and can be accessed from any Internet-enabled workstation, without the need for third-party software. Users can choose from a comprehensive selection of predefined reports as well as create their custom; ad hoc reports that can be used for further analysis. Reports can also be scheduled to run automatically at configured intervals.

All reports can be exported to a number of popular file formats including Microsoft Excel, Microsoft Word, Adobe PDF and CSV. Transit agencies are also provided with the capability to export an entire database and archive onto external sources using an Open Database Connectivity (ODBC) connection.

A significant feature of Ecolane DRT's reporting is the system's ability to collect and store information directly from manifest data via the MDT/AVL integration. This saves sizable staff and driver labor time because there is no need for manual data entry. In a recent Ecolane customer case study, automated data entry saved an hour of drivers' time per shift while also increasing the accuracy of their reporting.

Except correcting reservation agent or driver errors or entering data on trips delivered without an MDT, Ecolane DRT requires no manual data entry. To ensure accurate reporting, the system uses sophisticated data validation and error checking processes in the reservation and trip editing interfaces, among other areas.

#### 5.5.1.12.1 Predefined reports

Ecolane DRT provides an extensive set of predefined reports, which users can schedule to run automatically or generate on the fly. Each report has a variety of options that fulfill the majority of reporting needs. To further enhance reporting capabilities, Ecolane DRT can utilize external reporting software via ODBC connections.

A sample of the predefined reports that come standard with Ecolane DRT can be found below:

Alerts Resolution	List of Distinct Clients	System Productivity
Average Trip Distance	Miles/Hours by Funding Source	System Speed Adjustment
Average Trip Duration	NTD Key Performance Indicators	Total Passenger Miles
Billing Summary	NTD S-10	Total Passenger Trips
Capacity Demand	NTD Summary	Trip Count
Client Balance	OTP	Trip Distribution
Client Balance Transaction History	OTP by Driver	Trip Negotiation Window
Daily Run Productivity	OTP by Hours	Trip Time Distribution
Data Exception	OTP by Location	Trips by Funding Source
Driver Performance	OTP Late Trips	Trips by Purpose
Fare Summary	Problem Trips	Trips by Transportation Company
Fleet Utilization	Run Manifest	Trips per Client
Funding Source Fare Summary	Run Report	Vehicle Report
Funding Source Trips	Service Report by Client	Vehicle Start and End Mileage
List of Riders	State DOT	Vehicles in Maximum Service

Figure 20 shows an example of a Fleet Utilization report.

Ecolane DRT also provides trip export and client profile export reporting. This data can be exported to CSV and Microsoft Excel formats and used for any ad hoc reporting needs incorporating third-party tools.

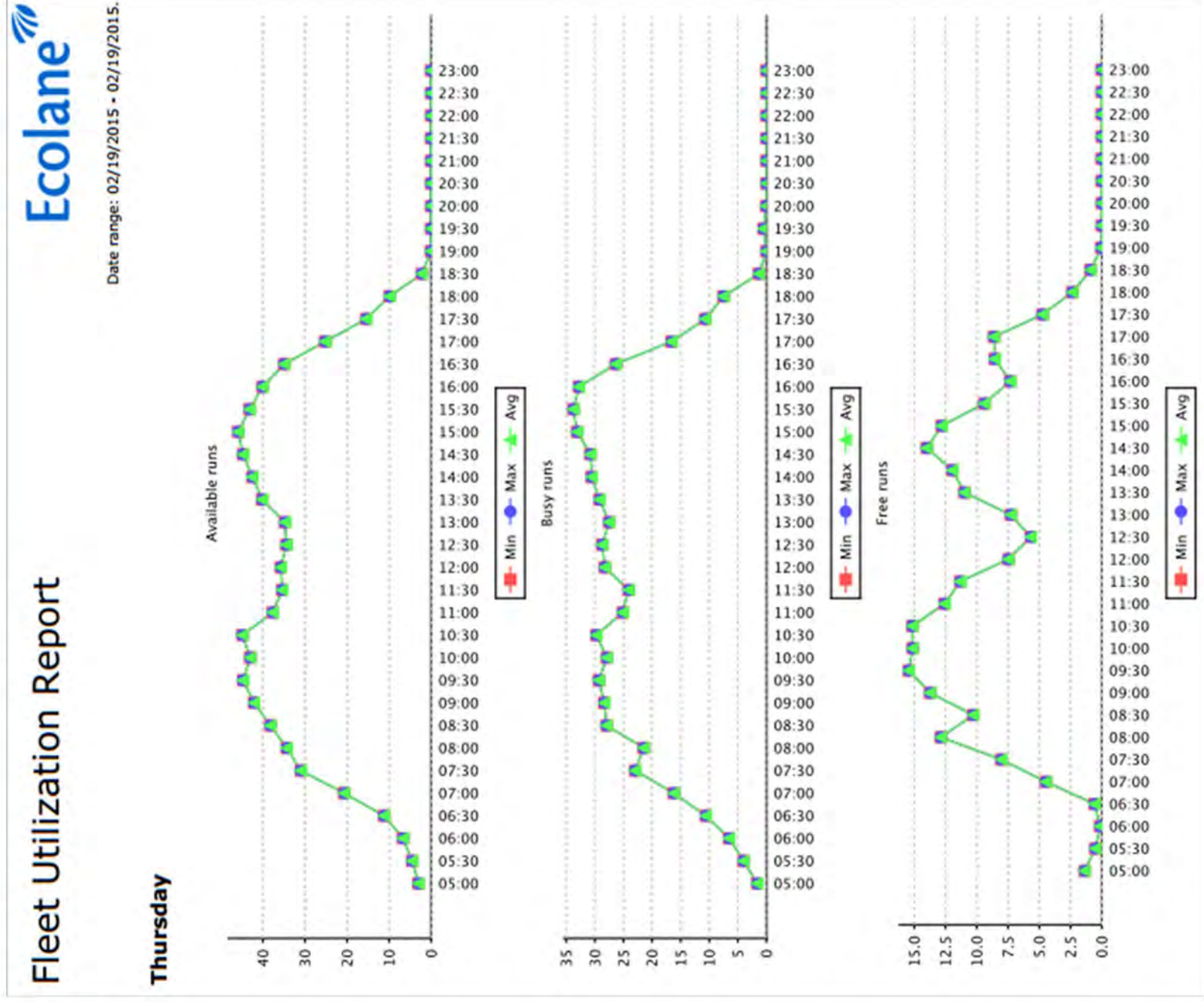


Figure 20. Fleet Utilization report

#### 5.5.1.12.2 Ad hoc reporting

In addition to Ecolane DRT's comprehensive set of predefined reports, transit agencies may wish to create ad hoc reports. With the easy-to-use web-based tools, users can define what data they want to use from the archive database, and generate the report results in a format of their choice.

#### 5.5.1.12.3 ODBC support

Ecolane DRT provides a standard Open Database Connectivity (ODBC) compliant interface for the reporting database. Transit agencies can retrieve data for further analysis in third-party reporting systems if needed.

Ecolane provides an extensive data dictionary when using third-party reporting systems. The data dictionary contains a detailed description of the report data fields and their relationships.

### 5.5.2 Available extensions

This chapter describes features that are available as extensions to the Ecolane DRT core functionality.

#### 5.5.2.1 Center management

Center management is intended for facilities and agencies (such as senior centers and workshops) where several clients use transportation services.

With the easy-to-use web-based center portal, the center's users can view their clients' trips, for example, to check trip timeliness against the estimated times given for pick-ups and drop-offs. They are also able to cancel trips on behalf of their clients, saving time and resources for the transit agency.

#### 5.5.2.2 Self-Service web bookings for clients

With the Self-Service feature, clients can view and manage their trips using a mobile application. Also, they have the option of using a publicly accessible website on their browser.

Clients can book and cancel their trips, and they can monitor their up-to-date estimated pick-up time and the vehicle assigned to their trip. This reduces the rate of 'where's my ride' inquiries to the call center.

A client's access to Self-Service is enabled in the client's profile. Access requires user authentication, and the usernames and passwords are managed by the transit agency staff. Transit agencies can limit a user's access; for example, some users might only be able to view trips.

All data communication between the Ecolane DRT server and the Self-Service mobile application or website is secure and encrypted.



The screenshot displays the Ecolane web application interface. The main form is titled "Please enter trip details" and is divided into "From" and "To" sections. The "From" section includes fields for Street number (415), Street or location (5 Jefferson St), City (Hastings), and a Note (knock on door, beware dog). The "To" section includes fields for Street number, Street address (203 E Woodlawn Ave), Street or location (HASTINGS BOWL), City (Hastings), and a Note. Below these sections are fields for Funding (General Public), Sponsor (no valid options exist), Trip purpose (Education), Assistant (personal assistant will also be traveling), Companions (0), Children (0), and Other passengers (0). There are also fields for Pickup or dropoff date (04/20/2017) and Time (03 PM). At the bottom of the form are buttons for "Book trip" and "Cancel".

A pop-up window titled "New trip accepted. Details for trip 241241 (Thu Apr 20 2017, 2:27 PM)" is overlaid on the right side of the form. It contains the following information:

- Trip #: 241241
- Ordered at: Thu Apr 6 2017, 5:42 PM
- Status: ordered
- From: 415 S Jefferson St, Hastings, Barry MI 49058
- Pickup note: knock on door, beware dog
- To: HASTINGS BOWL, 203 E Woodlawn Ave, Hastings, 49058
- Requested pickup: Thu Apr 20 2017, 3:10 PM
- Negotiated pickup: Thu Apr 20 2017, 2:27 PM (in 14 days)
- Current pickup estimate: 2:27 PM (in 14 days)
- Vehicle: Blue Buss 1
- Funding: General Public
- Trip purpose: Education
- Assistant: no
- Companions: 0
- Children: 0
- Other passengers: 0

At the bottom of the pop-up are buttons for "To main page", "Copy this trip", "Order return trip", and "Cancel this trip".

Figure 21. A rider booking a trip and checking the details for a self-service trip

### 5.5.2.3 Mobile App

Ecolane's newly released mobile app allows transportation agencies the ability to jump to the next level in the digital world. Passenger expectations are high nowadays, and Ecolane's mobile app meets and exceeds those expectations. The mobile app is accessible for both iOS and Android users. This allows passengers the ability to book trips in real time, check past and future reservations and reduces those "Where's my bus" calls to your Dispatchers.

Studies show that there are more smartphones in average households than desktop computers. The Return on Investment for agencies with the mobile app:

- Streamline Scheduling Operations – gives passengers the freedom to make reservations, even outside of regular business hours, reducing incoming calls on reservationists during the day
- No manual scheduling of trips required by Dispatchers
- Decreased Trip Losses – Automatic notifications remind riders of scheduled and upcoming trips
- Customized Offerings – Branding options matching agency colors, logos, and style
- Self-Registration – Agencies can give passengers the freedom to self-register via the mobile app for transit. This does not include self-certification. This feature can be turned on as needed.
- Fares can be paid for via credit card securely through the mobile app (3<sup>rd</sup> party charges will apply). This feature can be turned on as needed.



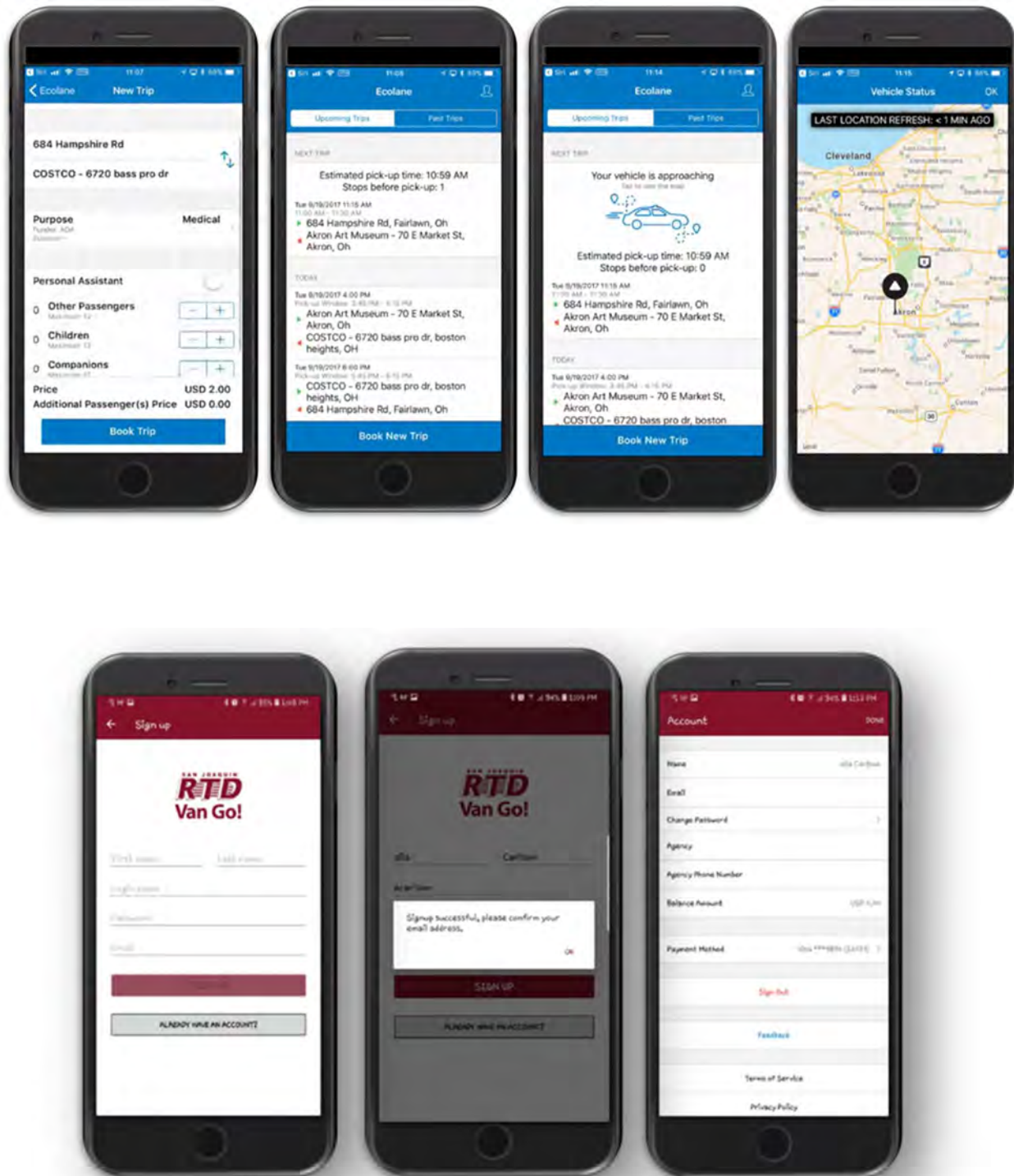


Figure 22. The Ecolane Mobile App in action

### 5.5.2.4 Alexa integration

Ecolane DRT also has an integration with Amazon's Alexa service to enable the use of the Self-Service functionalities via the voice assistant in the Amazon Echo line of products. If an agency has licensed and enabled this feature, clients can install the Ecolane skill on their Amazon

account and use their Self-Service credentials to access their account. The Ecolane Alexa skill allows clients to book new trips, review their travel schedule, and cancel trips. Simple questions such as:

- What day the trip is
- What time
- From where – Passengers can easily say from 'Home' as this will be saved as a favorite address for all passengers
- To where – Passengers can say an address, or a favorite destination, such as 'Work.'
- Purpose of the trip
- Followed up by a confirmation of the trip request by Alexa

**Asking Alexa to book a trip is easy! Passengers simply get permission for the Ecolane booking skill from the agency.**



**Once they give Alexa a few simple commands, she walks them through the process step by step, confirming the trip at the end.**

Figure 23. Alexa makes booking trips easy

### 5.5.2.5 SMS test message arrival notifications

With this feature, agencies can send clients up-to-date information on the status of their booked trips. As an example, clients can receive text message updates on the current estimated pick-up times. The content of these messages is fully configurable.

This feature helps to improve service quality and productivity by reducing a client's waiting time at pick-up locations as well as reducing no-shows and cancellations at the door. It also helps to decrease the number of 'where's my ride' calls and other trip-related inquiries to the call center.

The text message notification provides real-time information about the estimated arrival time (based on AVL data from the vehicle) and the name of the arriving vehicle.

A text message can also be sent if the client's trip could not be scheduled to a vehicle by the pick-up time and, for example, to instruct them to contact the call center.

### 5.5.2.6 Telephony integration

Ecolane DRT provides a selection of telephony integration features:

- Ecolane DRT interfaces to Private Branch Exchange (PBX) phone systems, supporting identification based on caller ID. Ecolane DRT can identify the caller by their phone number and automatically look up and display the client's data to the reservation agent.

This speeds up the reservation process and enables reservation agents to provide more personalized service to their clients. Depending on the transit agency's operations, the interface can be configured to open a specific view in the UI, such as a new order form or the client's travel history.

- Through strategic technical partnerships, Interactive Voice Response (IVR) calls can be made to clients to notify them of their trip status. Ecolane DRT can make reminder calls to clients the night before a trip and provide them with the option to cancel their travel if necessary. Imminent arrival reminder calls can be made on the day of service to inform clients about estimated pick-up times.

### 5.5.2.7 Pre/Post Trip module on the MDT

Agencies can customize Pre/Post Trip lists that will appear on the MDT for drivers to utilize to mark items that are required and optional as 'OK' or 'Fail.' As items on the list are marked, if an item is marked as 'Fail,' an alert is sent back to dispatch in real-time and appears on the Alerts tab of the Supervisor UI. Drivers can access the Pre/Post-trip by going to the 'Inspections' option in the menu on the MDT.

Below in Figure 24, is an example of the Pre/Post Trip list on the MDT. This information is recorded in the vehicle maintenance module, and users can search for checklists in the 'Archive Trips' tab of the Supervisor UI.

**Vehicle Exterior**

No signs of leaks under vehicle

Tires inflated

Windows and mirrors clean

Doors open/close

Bypass Inspected 0/62 (54 mandatory remaining) Send

Figure 24. Pre/Post Trip module on the MDT

Agencies can create their own custom pre/post trip lists, as can be seen in Figure 25. Items can be marked as mandatory or optional. This is completely up to the agency!

**General**

Form name:  Validity start: 25 Jul 2018

Provider:  Validity end: 25 Jul 2050

Fail message:

**Inspection items**

Type: Mandatory Category: Electrical Text:

Move Item # 1 Before Item # 1 Move

#	Type	Category	Text	Update	Delete
1	Group	Safety	Tires and Wheels	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
2	Mandatory	Safety	Tire condition, tread depth and air pressure	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
3	Optional	Safety	Wheels and rims for cracks, rips, welds or protruding objects	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
4	Mandatory	Safety	Lug nuts tight, no excessive rust or damage	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
5	Group	Motor	Engine Compartment	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
6	Mandatory	Motor	Engine Oil	<input type="button" value="Update"/>	<input type="button" value="Delete"/>

Figure 25. A user creating a pre/post trip list in Ecolane DRT



### 5.5.2.8 Electronic signature capture on the MDT

The electronic signature capture feature makes it possible to collect electronic signatures from clients and accompanying passengers with the MDT. The signature capture is seamlessly integrated into the process with which the driver handles client and passenger information in the MDT at stops.

The signatures are entered with a drawing tool in the MDT. They are stored in Ecolane DRT as image files along with other trip information and are available for reporting needs.

Signatures can be captured from clients and accompanying passengers board the vehicle, as well as from guardians of underage clients. They can also be obtained from guardians of underage travel-alone clients who are meeting the client at the destination, and, if needed, even from the driver at MDT login. The process for signature capture is highly configurable, allowing MDTs to prompt for a signature only when required.

### 5.5.2.9 Fixed routes

The fixed routes feature provides transit agencies with the ability to create and manage fixed routes efficiently and deviated fixed routes alongside demand response services. Using MDTs, full AVL/GPS-verified performance data can be collected for these routes.

Defining a fixed route is easy and intuitive. The user specifies the stops on the route and plans the stop schedule. Ecolane DRT provides planning assistance by calculating the distances and drive times between the stops. A fixed route can also be set to allow flag stops, which means the driver also accepts passengers from stops other than the fixed ones.

Fixed routes can be quickly transformed into deviated fixed routes. This allows the addition of demand response trips to the route, resulting in deviations from the defined route. Users have complete control over the amount of deviation from the route, while Ecolane DRT determines the appropriate deviation time between stops.

### 5.5.2.10 GTFS interface

Ecolane DRT supports a General Transit Feed Specification (GTFS) interface, which enables third parties to fetch information on fixed routes and their current vehicle locations, as well as stop updates. Agencies can enable the GTFS feed per fixed route.

### 5.5.2.11 Public transportation

The public transportation feature allows agencies to build in public transit connections for trips booked through the call center. This type of connection may be offered when specific criteria are met, for example, the trip takes place within the service area of a public transit provider, and the client does not use a mobility device. The connections are fetched from Google Maps over the Google Directions Application Programming Interface (API).

The criteria for offering these types of connections are configurable. Transit agencies can define, for example, the maximum walking distance allowed at the beginning or end of a route or between transfer stops, and how much longer a public transportation connection is permitted to take compared to the trip's ideal duration.

Users will be able to see at the point of booking if a fixed route trip is available to meet the requirements of the trip, as can be seen in *Figure 26*.

**Client information**

Billy Busrider (432423439)  Age: 46

**Order Confirmation**

**Current order**

Order#	Date	Pick-up	Drop-off	Pick-up location	Pick-up code	Drop-off location	Drop-off code	Distance	Funding	Service	Run Status
pending	Thu 07 Jun 2018	13:11 Eastern (13:11)	14:19 Eastern	75 Westwoods Blvd, Columbus, Oh 43119	(not selected)	1700 Northwest Blvd, Columbus, Oh 43212	(not selected)	9.08 miles (Ideal) 8.09 miles (fare)		PASSPORT Unrestricted -	Open

**Current scheduling**

**Public transport connection**

13:11 Eastern	0.03 miles	Walking		
13:12 Eastern	2.24 miles	Bus		21 Westwoods Blvd & Westwoods Park & Ride
13:20 Eastern	0.05 miles	Walking		Hilliard Rome Rd & Renner Rd
13:49 Eastern	6.4 miles	Bus		5 Renner Rd & Hilliard Rome Rd
14:12 Eastern	0.33 miles	Walking		W 5th Ave & Northwest Blvd

Provider: -

New pick-up time: 1300 Eastern (hh:mm/hh:mm) Negotiation: -50 +60 min

HEAD / 4.6.0.5  
a1b646fa447e700d8b812c99b3b67791c35c97b2

Ecolane

Figure 26. Real-time scheduling results at the point of booking for all trips

If a user chooses this method to book the trip, this choice will then be recorded with the details of the trip and can be seen by simply looking at the trip details, as shown in Figure 27.



Client information

Billy Busrider (432423439)

Search another client

Age: 46

New Order

Travel History

Subscription History

Client Details

Trip Details

page generated at 19:05:59

Refresh

Order#	Reservation time	Agent ID	Trip type	Service type	Provider (status)	Status	Shared	Trip Cost	External Order ID
506394	Wed 06 Jun 2018 19:04	ella	Normal	Unrestricted	COTA (none)	Complete	No		

Map

Location	Location phone	Requested time	Negotiated time	Estimated time	Vehicle arrived	Vehicle departed	Stop duration (min)	Date	PU/DO Phone
Pick-up 75 Westwoods Blvd, Columbus, Oh 43119		13:00 Eastern (-60/60)	13:11 Eastern	13:11 (12:56/13:26) Eastern	13:11 Eastern	13:11 Eastern	-	06/07/18 (Thu) Eastern	5551234567
Drop-off 1700 Northwest Blvd, Columbus, Oh 43212		-	-	14:19 (11:45/15:01) Eastern	14:19 Eastern	14:19 Eastern	-	06/07/18 (Thu) Eastern	5551234567

Group	Travel alone	Device	Vehicle req.	PCA	Companions	Children	Other pass.	Cust. phone	Recip. phone	SMS notification	IVR callout	IVR notification
-	No		None	No	-	-	-	5551234567	-	No	No	No

Funding source	Purpose	Sponsor	Billing code	Full fare code	Client co-pay code	Sponsor share code	Additional psgrs code	Full fare	Funding share	Sponsor share	Final client co-pay	Additional passenger fare
PASSPORT	Shopping	-	PASSPORT	PASSPORT	PASSPORT	-	-	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Fare type	Fare quantity	Additional fare type	Additional fare quantity	Final client received	Final additional passengers received
Cash	1	-	-	-	-

Paid fare type

Paid fare quantity

Cash

1

Event history [±]

Leave comment [±]

Scheduling results

Duration	Length	Run	Fare distance	Public transport connection					
Ideal	17 min	9.08 miles	8.09 miles	COTA	13:11 Eastern	0.03 miles	Walking		
			Update		13:12 Eastern	2.24 miles	Bus		21 Westwoods Blvd & Westwoods Park & Ride
					13:20 Eastern	0.05 miles	Walking		Hilliard Rome Rd & Renner Rd
					13:49 Eastern	6.4 miles	Bus		5 Renner Rd & Hilliard Rome Rd
					14:12 Eastern	0.33 miles	Walking		W 5th Ave & Northwest Blvd

Target runs:

No target runs specified

Show trip list

Return trip

Copy order

HEAD / 4.6.0.5

a11b46da447c700db812ca9b3b67791c35c9712

Ecolane

Figure 27. Trip details for an already booked trip

To provide accurate statistics for agencies on the demand response service, public transportation trips are excluded from individual reports. However, there are also reports where agencies can manually include these trips if needed.

### 5.5.2.12 Feedback

The Feedback feature provides tools for collecting and tracking issues reported on the service provided.

Feedback issues can be linked to trips, drivers, vehicles, and reservation agents. To provide supporting data for efficient resolution, users can also attach files to an issue. Additionally, log data is provided for tracking progress and the actions taken.

A feedback issue can provide such information as the incident time and date; the person who reported it; the related trip, driver, vehicle, and agent; and the incident type. Definable categories and status group feedback issues and users can search them using advanced search options.

The screenshot displays a web-based feedback form titled "Edit item". It is divided into three main sections:

- Search for a trip:** Includes a "Trip ID" field with the value "1234" and a "Search" button. A note states: "Searching for a trip will automatically populate trip related fields if a related trip is found". Below this is a "Trip Date and Time" field showing "25 Jun 2012 08:32 EDT".
- Feedback Details:** Contains several input fields and dropdowns:
  - "Number": #34
  - "Date Created": 09 Oct 2013 18:44 EDT
  - "Agent": daniel
  - "Issue Date and Time": 25 Jun 2012, 08:32 (hh:mm)
  - "Issued by": Rex Clark, with an "Anonymous" checkbox.
  - "Relation to customer": No Relation (dropdown)
  - "Category": Driver (dropdown)
  - "Status": Closed (dropdown)
  - "Type": Radio buttons for Neutral, Positive, and Negative (Negative is selected).
  - "Description": A text area containing "Driver was rude to Dan, and threw coffee on him."
  - "Response Requested": Radio buttons for No and Yes (Yes is selected).
  - "Contact information": A text field containing rex@example.com.
- Related Information:** Contains fields for:
  - "Client Name": Dan Anger
  - "Client #": 607
  - "Vehicle ID": (empty field)
  - "Transportation Company": BCT (dropdown)
  - "Driver Name": Rex Clark
  - "Employee number": (empty field)

Figure 28. A user entering a feedback item for a trip or passenger

### 5.5.2.13 Order import

Ecolane DRT's order import allows transportation providers to batch schedule trips that they receive from external sources, such as from a transit coordinator or a broker. A standard CSV template for importing trips is provided.

### 5.5.2.14 EDI eligibility and billing integration

The Ecolane software provides an Electronic Data Interchange (EDI) module for eligibility and billing communications with external systems. The EDI interface enables transit agencies to:

- Verify from the third-party system if clients are eligible for monetary compensation for upcoming trips
- Generate claim payment-related files for external assessment and parse the remittance advice received in response

The EDI module is based on ASCII X12 5010 standards. Typical implementations include 270/271 eligibility verification, 834 eligibilities importing, 837P claim and 835 remittance formats.

Contract providers often use their implementations of the standard for interfacing with external systems. Ecolane has successfully implemented a number of these integrations for partner agencies.

### 5.5.2.15 Provider portals

A portal, similar to what a call-center dispatcher would utilize can be utilized by a provider or subcontractor to see information about only their trips. To see a brief rundown of the tools that will be provided to them within this portal, please refer to the sections regarding *Real-time automated dispatching and monitoring* and *Provider, run, vehicle and driver management*.

Providers would be able to manage their own fleet availability within this portal as well as can be given the ability to black list a trip if for some reason they are given a trip that is outside of their service area or that they are unable to meet. Trips that are blacklisted are sent back to dispatch for reassigning.

### 5.5.2.16 Provider reporting

Providers can also be given access to a pared down, web-based version of the Ecolane DRT reporting module. The functionality of this is extremely similar to the full version of Ecolane's advanced reporting module. The only true difference is that providers choose up to 10 reports that they would like to see and are only able to see statistics on the trips they have performed.

Providers will also be able to create their own ad-hoc reports with the Trip Export tool as needed.

More information about our reporting module can be found in Section 5.5.1.12 regarding *Reporting*.

## 5.6 Hosting and security

As a hosted service for transit agencies, Ecolane DRT provides significant cost savings with no compromises on safety.

Ecolane's hosting service includes all of the hardware and software needed to run the solution. The service eliminates all direct hardware costs, server operating system costs, and database costs. Ecolane's data centers provide fully redundant service; automatic failover power; Heating, Ventilating, and Air Conditioning (HVAC); and network system management to ensure the highest level of availability.

Beyond the significant cost savings of avoiding hardware purchases, Ecolane's hosted solution also minimizes IT management staff costs. With a hosted service, there is very little need for involvement from the agency's IT staff beyond ensuring that public internet connections remain active.

Ecolane's Professional Services group has extensive knowledge and experience with the hosting environment, further ensuring that the solution is configured to deliver maximum performance.

Ecolane encourages agencies to compare the costs of Ecolane's hosted solution with the costs of managing an entirely self-hosted infrastructure.

## 5.6.1 Data center characteristics

Ecolane uses an enterprise-class data center that provides mission-critical networking, hosting, and communication services. The operation of the data center network and services is monitored 24 hours a day, 365 days a year.

### 5.6.1.1 Physical characteristics

The data centers use a redundant infrastructure as well as constructional protection to minimize the possibility of network or service interruptions:

- *UPS*: Redundant and uninterruptible power supply systems with automatic failover
- *Climate control*: Redundant HVAC systems with automatic failover
- *Networking*: Redundant network connections with automatic failover
- *Fire protection*: Redundant automatic fire protection consisting of powder-based extinguishing systems and smoke and heat detection devices
- *Raised semiconducting floor*: A raised semiconducting floor to prevent the formation of static electricity
- *Constructional/security protection*: Door constructions, locks, and protection against break-in

The physical protection of the premises, including the construction of doors, locks, and protection against break-ins, has been planned to prevent any unauthorized access to the facilities. Doors are locked by mechanical or electromechanical means, and prevention of water damage has been taken into account as well.

### 5.6.1.2 Passage control

Photo ID cards identify all personnel with access to the data center, and all data centers have continuous video surveillance. The Ecolane servers are stored in locked cages, and if ever needed, Ecolane's personnel are given 24/7/365 access to these servers.

### 5.6.1.3 Recovery

Ecolane, in cooperation with the data centers, has a recovery plan and process in place in the event of a catastrophe that renders one or more of the data center locations inoperable.

The plan includes the use of:

- Multiple data center locations if the primary data center location is rendered inoperable
- A secondary, off-site facility for storing all recovery and backup data

- A responsibility list for each task that needs to be completed during the recovery process

The recovery times for various scenarios:

- A production server hardware failure: 4 hours
- Catastrophic server hardware failure: less than 8 hours
- Catastrophic data center failure: Less than 48 hours

## 5.6.2 Security and HIPAA compliance

Ecolane takes exhaustive steps to ensure that all security measures are in place to protect the Ecolane solution.

All communications in and out of the data centers use Secure Socket Layer (SSL) 2048-bit encryption and are Health Insurance Portability and Accountability Act (HIPAA) compliant.

- A HIPAA compliance document is available upon request.
- Access to all areas of the Ecolane solution requires user authentication (a username and password).
- Each user is granted specific rights and permissions, which can be used to restrict the user's access to specified user interfaces, features, and functionalities.
- Firewall rules can be defined to restrict access based on network addresses.
- Access to the Ecolane servers is firewalled and restricted with highly secure user authentication.
- The Ecolane data center is Statement on Standards for Attestation Engagements (SSAE) 18 Type 2 Service Organization Control (SOC) 2 compliant.

## 5.7 Hardware and software requirements

This chapter lists the hardware and software requirements for Ecolane DRT.

### 5.7.1 Workstation hardware and software requirements

Ecolane DRT is entirely web-based, which means there is no need to install software on local workstations beyond a standard web browser.

To successfully use Ecolane DRT on a workstation, Ecolane recommends the following hardware and software:

- A standard PC running a Windows 7 operating system or higher
- A network card: 10/100/1000 MB
- A monitor (minimum 1280 x 1024 resolution, 1920 x 1080 resolution recommended)
- A standard keyboard and mouse
- A web browser:
  - Internet Explorer 9.x or higher
  - Mozilla Firefox 3.x or higher



- Google Chrome 3.x or higher
- Google Earth (optional)

## 5.7.2 Ecolane MDT hardware

Ecolane uses commercially available Android tablets for the MDT software to run on, and continually reviews and certifies new devices for use in service. Please contact Ecolane to obtain the most up-to-date information, as new devices are added to the approved list on a regular basis.

The following is a sample list of devices.

Device	Carrier
Alcatel One Touch Pixi 7	T Mobile
Asus Zenpad Z10	Verizon
Ellipsis 7	Verizon
Ellipsis 10	Verizon
Galaxy Tab S2 8" and 9.7"	Verizon
Galaxy Tab S3	Verizon
Google (Asus) Nexus	Verizon
Google Nexus 7	T Mobile
HTC Flyer	Sprint
Lenovo IdeaTab A2107	AT&T
LG G Pad 7.0	U.S. Cellular
LG G Pad 8.3	Verizon
LG G Pad 10.1	Verizon
LG G Pad F 8.0 2nd Gen	U.S. Cellular
LG G Pad X 8.3	Verizon
LG G Pad F 8.0 Plus	Cellcom
Samsung Galaxy 2	Verizon
Samsung Galaxy 2 (10 inches)	Verizon
Samsung Galaxy 3	Sprint, AT&T, T Mobile
Samsung Galaxy 4	Sprint, Verizon, AT&T
Samsung Galaxy 4 (10 inches)	Verizon, US Cellular
Samsung Galaxy Mega 6.3	Sprint
Samsung Galaxy Note 8.0	AT&T
Samsung Galaxy Tab E	AT&T

Samsung Galaxy Tab E 8"	U.S. Cellular
Samsung Galaxy Tab E 9.6	Verizon
Samsung Galaxy Tab S (10 inches)	Sprint, Verizon
SONY Xperia Z2 Tablet	Verizon

## 5.8 Implementation and training services

Ecolane provides implementation and training services for transit agencies to best ensure successful implementations and go-lives of the Ecolane DRT system.

During implementations, Ecolane first works with transit agency staff to assess the agency's operations. Data is collected and analyzed in stages as the go-live date approaches. Specifications are determined for funding and billing, client import, administration user accounts, and client home address geocoding, among others.

Client data and subscriptions are imported, service parameters are configured according to the agency's needs, and location, provider, run, vehicle, and driver data is set up in the system. In addition to reviews during the implementation project, a go-live review is conducted to make sure that the system and the agency are fully prepared for making the system operational.

## 5.9 Annual Licensing Plan

Ecolane is continuously improving and developing new beneficial features and functionalities that have a positive operational impact. Working in partnership with our customers, we listen and are committed to their success. This plan ensures that our customer has a properly functioning version of Ecolane through the deployment of standard upgrades and updates (including patches).

The Ecolane all-inclusive annual licensing package includes:

- 1st year for hosting, support, maintenance, updates, and upgrades is included in total purchase cost

Annual licensing fees after year one include the items below.

### 5.9.1 Web Hosting

Ecolane is a 100% web-based program. There is no server that will need to be installed onsite at the agency. All data is hosted at a state-of-the-art server farm that has maintained a 99.99% uptime over the past 9 years. Multiple redundancy servers and different locations are in place in case a server or the server farm goes down. If this happens, a backup server or site will take over, so clients can continue to use Ecolane DRT.

Something to remember as well that even if the internet goes down, Ecolane DRT will continue to dispatch trips to MDTs. Ecolane is accessible from any web-enabled device and in the case the internet goes down, devices such as smartphones and tablets or a laptop with a cellular air card or a hot spot can be used to access Ecolane DRT, so dispatchers can continue to work until the internet is working again.

## 5.9.2 Server Maintenance

Because there is no server hardware installed onsite, Ecolane will maintain the server hardware for all primary and redundant servers. Agencies will not have to worry about having IT staff on hand to manage an on-site server. If there is any hardware that needs to be replaced on the server during the course of the contract at the server farm, Ecolane will handle this as part of the annual licensing fee.

## 5.9.3 Map Updates

Ecolane's Professional Services team will update your maps once a year as part of the annual licensing fee. Transit agency staff will also be taught how to update the map between times in case new buildings/offices/facilities are built between updates. All map updates will be coordinated with the agency the same as an upgrade or update to the system will be communicated to the agency.

## 5.9.4 Support

Ecolane's Support team is available 24/7/365 to its customers. There are multiple ways to reach Ecolane's Support team. Tickets and questions can be filed via the Ecolane Helpdesk, by email or phone. Even if the Support team is not in the office at the time of a phone call, the phone is always forwarded to the cell phone of a support team member that is on-call to answer any questions or help with any issues that may come up for customers outside of office hours.

Ecolane also provides a support website at [helpdesk.ecolane.com](https://helpdesk.ecolane.com), where transit agency staff can find web-based tools and information, such as Frequently Asked Question (FAQ) lists, user documentation, training manuals, tutorial videos, and the system knowledge base.

Transit agencies report issues using Ecolane's web-based request tracking system. On the site, customers can review problems and see when and how those issues are resolved.

During and after scheduled upgrades and updates, Ecolane support is on high alert to ensure that any issues, questions, or support requests are handled and resolved.

## 5.9.5 Upgrades and Updates

Ecolane will provide standard upgrades and updates according to Ecolane's version plan without charge. Any customization work will be based on a separate agreement. Ecolane provides training for major modifications at no additional cost. Release notes are sent out ahead of time, so agencies can read up on the changes before the training and upgrades occur.

As part of Ecolane's annual license agreement, it will continue to support previous versions of the software until all customers are on the latest version. Ecolane does phase roll-outs across their clientele when an updated version is released to help keep everyone on the same version, making support easier.

Ecolane follows industry standard software development and testing procedures during all phases of product development.

### 5.9.5.1 Upgrades

Upgrades are different in the sense that they do not address the two issues, but instead, make an OEM version or Standard version and advance it to the next release. They are adding more features to your base system.

### 5.9.5.2 Updates (Patches)

In software terms, a patch (or update) is meant to address two issues -- (1) to correct bugs (or problems) within the software that makes it perform less than optimal and (2) to add new compatible hardware support. The latter is due to the constant development of new features since the launch of our software.

### 5.9.6 Free monthly webinar training

Ecolane's Support team offers free webinar training on topics suggested by customers or on topics that are receiving a high amount of ticket volume at the time and are suggested by Ecolane's Support team. These webinars are recorded and can be accessed on the Ecolane help desk.

### 5.9.7 Aha! idea portal access

All customers have access to an idea portal where ideas and comments can be suggested for new or updated features for the software, along with the ability to converse with other Ecolane customers about the ideas. Ecolane's executives review these suggestions and ideas that agencies have and use it to help drive development and the direction of the Ecolane solution.

# Glossary

The following table explains the terms and acronyms used in this document.

Term or acronym	Description
ADA	American Disability Act
API	Application Programming Interface
ATI	Advanced Traveler Information
Availability	Run availability; the rules that define when a given run is available for service as well as non-available times such as breaks.
AVL	Automatic Vehicle Location
Client	An end user; the person receiving the transportation service.
Client profile	A set of information that describes client-specific details and the client's requirements and preferences for travel.
Cluster	<p>The day's schedule on the run from pull-out to pull-in. A cluster contains stops for client pick-ups and drop-offs as well as for breaks.</p> <p>Trips are initially assigned to virtual clusters, which serve as a 'scratchpad' for the system. Real-time optimization moves trips from virtual to real clusters as each trip's delivery time approaches, and the real cluster is dispatched to the MDT.</p>
CSV	Comma Separated Value
Dashboard	A page in the Supervisor user interface that summarizes operational data reported to the Ecolane DRT system. Users can monitor the up-to-date service situation of the current day.
DBMS	Database Management System
Dispatching	<p>Dispatching a trip refers to sending it to a vehicle's MDT or including it in a printout manifest.</p> <p>Ecolane DRT automatically dispatches trips to vehicles that have an MDT. In case of vehicles with no MDT, users manually dispatch the daily clusters and their trips from the UI.</p>
DOT	Department of Transportation
EDI	Electronic Data Interchange
ETA	Estimated Time of Arrival
FAQ	Frequently Asked Question
Funding source	<p>A party that funds client trips (for example, a government health care program). Two types of funding sources can be defined in the system, major and sponsor, and a funding source can also act in both roles.</p> <p>When a client books a trip, the trip reservation must always specify which major funding source will fund the trip, and it may also specify a sponsor who co-funds the trip.</p>
GIS	Geographic Information System



Google Earth	An external program used to view information on a three-dimensional map graphically.
GPS	Global Positioning System
GTFS	General Transit Feed Specification
HIPAA	Health Insurance Portability and Accountability Act
HVAC	Heating, Ventilating, and Air Conditioning
IOU	I owe you
IVR	Interactive Voice Response
KML	Keyhole Markup Language
Leg	The distance traveled between two stops.
MDT	Mobile Data Tablet
Mobile Data Tablet	MDT; the device in the vehicle that provides an up-to-date manifest to the driver, and that the driver uses to report stops and communicate with dispatch.
Negotiation window	When the client requests a specific time for a pick-up or drop-off (depending on the trip type), there is an allowed time frame for finding a suitable time to match the requested time. This is called a negotiation window. Default negotiation windows can be configured in the system for each trip type.
NEMT	Non-Emergency Medical Transportation
No-show	The status of a trip when the driver arrived at the pick-up stop but the client did not show up.
NTD	National Transit Database
ODBC	Open Database Connectivity
OTP	On-Time Performance
PBX	Private Branch Exchange
PCA	Personal Care Assistant
PDF	Portable Document Format
POI	Point of Interest
Point of Interest	A named common location used in scheduling, for example, a hospital. In addition to system-wide POIs, Ecolane DRT allows defining client-specific POIs for easier booking.
QoS	Quality of Service
Run	A definition of transport availability and capacity that Ecolane DRT uses to schedule trips. A run specifies the service days and hours when it is available, as well as breaks. The vehicle assigned to it determines the run's seating capacity.
Scheduling	Ecolane DRT automatically schedules each trip in the system, although manual override functions are also available. The system uses continuous optimization for optimal scheduling efficiency and maximum flexibility,

	taking into account changes on the day of services such as cancellations or no-shows, same-day bookings, or changes in traffic flow.
Service rules	A set of rules and configurations that define the behavior of specific paratransit service.
SMS	Short Message Service
SOC	Service Organization Control
SSAE	Statement on Standards for Attestation Engagements
SSL	Secure Socket Layer
Stop	A location in a cluster, for example, an address where the vehicle picks up or drops off a client, or a pull-out, pull-in, or break stop.
Subscription	A template for generating recurring trips, for example, a trip that should occur every Monday and Friday for the next three months. The system automatically creates trips in advance depending on the configuration, for example, for the next two weeks.
Trip	One client's reservation for transportation from a pick-up stop to a drop-off stop. The trip contains information related to the reservation and its transportation details. Ecolane DRT allows creating different types of trips to match client needs.
User	A user of the Ecolane DRT system, for example, a call center agent or a dispatcher.
Vehicle	The physical vehicle that is assigned to operate a run. Each vehicle is defined in the system, including information about the seating capacity.
VPN	Virtual Private Network
Will-call trip	A type of pick-up trip used when the client is returning from an appointment, and they are unsure what time they will be ready for a pick-up. The will-call trip is only scheduled and dispatched when the client calls in and confirms the pick-up time.

# Response to National Cooperative Purchasing Alliance (NCPA) RFP for Transportation Software Solicitation #: 06-19

## **NCPA Region 14 Education Service Center**

Tab 8 – Value Added Products and Services



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## 8 Value Added Products and Services

Ecolane has as standard to any contract the Ecolane Demand Response Transportation (DRT) management software system and the Ecolane Touch Screen Mobile Data Terminals (MDTs) for NCPA Solicitation 06-19. Below we have listed the multitude of additional products and/or services available that we perform in the normal course of business but was not included in the scope of solicitation.

- Additional add-ons that are included that can be mixed/matched as needed dependent upon site include:
  - SMS Text Message Arrival Notifications: Ecolane pushes a text message to a rider's smart phone. The text message will advise the customer that their vehicle is about to arrive. (3rd party charges apply)
  - IVR interface hosted solutions from Enghouse or UDI for the night before and/or day of arrival call notifications (3<sup>rd</sup> party charges will apply)
  - Online self-service with Alexa Booking Skill where passengers can book trips by merely talking to Alexa. Trips can also be checked on and cancelled just by asking Alexa
  - Customer Service and Feedback module
  - GTFS Integration for checking to see if it's possible for a demand response trip to be completed by fixed route based upon parameters set by NCPA Region 14 ESC
  - Order Importer module to import trips for scheduling from other sources
  - Pre/Post Trip functionality on the MDT
  - Electronic signature capture on the MDT to collect client signatures
  - Provider/Subcontractor dispatch portal
  - Provider/Subcontractor reporting module
  - Center management portal: an online portal which authorized representatives of agencies, dialysis units and other organizations can use to manage service on behalf of their clients.
  - Ecolane's mobile app is available for iPhone or Android users. The self-service portal is brought to the mobile device of any agency paratransit customer who wishes to use it.
- Services for:
  - 20 days of data conversion by the Ecolane Project Manager (PM), including remote set up and remote training for staff
  - A 2-3-day onsite survey by the Ecolane PM to learn more about operations
  - 15 days of Onsite training/go-live support
  - 4 trips total for travel for the project
- Annual licensing includes the following items:
  - Support for all licenses purchased
  - 24/7/365 Support via online, email and phone
  - Web-hosting fees
  - Maintenance on the hosted web server



- Major version upgrades of the software each year as long as there is a valid service license agreement, along with free webinar training for upgrades
- Unlimited minor updates as needed between major version upgrades
- Map updates
- Free webinar training on topics suggested by customers, along with access to recordings of webinars
- Access to an idea portal where ideas and comments can be suggested for new or updated features for the software, along with the ability to converse with other Ecolane customers about the ideas

The Ecolane DRT software is a proven system in the management of paratransit services in both small and large transit systems operating in city, suburban and urban environments. The Ecolane Solution for transit management includes the required scheduling, routing, dispatching, billing, reporting, and database functionalities needed by agencies to provide premium service to their customers. While providing the management and scheduling solution for their present fleet, the Ecolane Solution will provide capacity for any system to quickly grow and add more vehicles and areas in the future. Ecolane delivers superior technological solutions at every turn, as technology changes or the needs of the transit agency change our solution can evolve with you.

The table below provides an overview of some of our customers using Ecolane, and what they had in place before making the switch. In nearly all cases, the Rides Per Hour (RPH) under the previous solution is at least 20% less than the Ecolane delivered RPH and often times significantly higher.

Agency	Trips / Day	Service Vehicles	Before	After	RPH Increase	On-Time Performance	Previous Software
			Pre-Ecolane RPH	Ecolane Delivered RPH	Efficiency Increase		
Santa Maria, CA	84	4	1.25	3.14	151%	90%	Routermatch
Bucks, PA	1,473	100	1.43	2.48	73%	93%	Access Database
Detroit DOT, MI	1,101	47	1.40	2.42	73%	84%	TripSpark
Akron Metro, OH	1,017	78	1.25	2.14	71%	91%	init
Maple Grove, MN	107	5	2.20	3.61	64%	98%	Routermatch
LANTA, PA	1,686	90	1.60	2.52	58%	87%	Transched
MET Transit, Waterloo, IA	255	17	2.60	3.91	50%	99%	TripSpark
Metro Connection, Sheboygan, WI	136	6	2.08	2.84	37%	97%	Routermatch
Lancaster, PA	887	46	1.89	2.51	33%	92%	Transched
Suburban TransNet, Philadelphia, PA	2,900	159	1.70	2.25	32%	90%	Trapeze
Blair Senior Services, PA	478	21	2.39	3.13	31%	95%	Routermatch
Ashland, OH	107	5	2.54	3.29	30%	95%	Routermatch
Arlington Handitran, TX	400	20	1.86	2.34	26%	97%	PTMS
Beaver County, PA	286	12	2.34	2.94	26%	92%	Routermatch
Gold Coast, CA	415	21	1.86	2.27	22%	90%	Trapeze
Chester, PA	1,206	65	1.85	2.23	21%	86%	The Q
Link Transit, WA	192	9	2.50	2.86	14%	87%	Routermatch
rabbittransit, York, PA	3,300	103	2.24	2.38	5%	91%	TripSpark
Average % Efficiency Increase <sup>1</sup> : 45%							

## 8.1 Maintenance, Support & Upgrades

We track each support request that comes into our support center and our average response time is much less than the requirements of the Service Level Agreement. Ecolane will always be available for customers and will work diligently to correct any issues that may arise. The

Ecolane team is dedicated to providing the highest level of customer service available within the paratransit software industry.

### 8.1.1 Support Plan

Ecolane's goal is to provide a 100% available system that delivers benefits to our customers. This means that when a customer logs into their Ecolane system, the system is up and available for use. Ecolane is committed to resolving customer needs and issues quickly and professionally. Highly skilled Ecolane engineers and support specialists resolve all support issues; this allows Ecolane customers to have quick access to persons with the technical ability to address any problems.

Ecolane's Support team is available 24/7/365 to its customers. There are multiple ways to reach Ecolane's Support team. Tickets and questions can be filed via the Ecolane Help Desk, by email or phone. Even if the Support team is not in the office at the time of a phone call, the phone is always forwarded to the cell phone of a support team member that is on-call to answer any questions or help with any issues that may come up for customers outside of office hours.

Ecolane also provides a support website at [helpdesk.ecolane.com](http://helpdesk.ecolane.com) where transit agency staff can find web-based tools and information, such as Frequently Asked Question (FAQ) lists, user documentation, training manuals, tutorial videos, and the system knowledge base.

Transit agencies report issues using Ecolane's web-based request tracking system. On the site, customers can review problems and see when and how those issues are resolved.

The Ecolane customer support plan provides insight into the processes, procedures, and response target times for customer technical support requests, which help Ecolane to meet its commitment to all customers.

During and after scheduled upgrades and updates Ecolane support is on "high alert" to ensure that any issues, questions, and or support requests from the customer are handled and resolved as promptly as possible.

A valid Service Level Agreement contract is required as part of our All-Inclusive Annual Licensing Plan.

To best serve Ecolane customer's needs, a variety of methods are available for Ecolane customers to contact Customer Support to help resolve issues, provide feature requests or merely to ask questions of the Ecolane support team.

### Support Website

As part of Ecolane's commitment to superior customer service, the company provides a comprehensive and feature rich Customer Support Website. There are many self-help options available on the site including:

- **ONLINE SOFTWARE SOLUTIONS LIBRARY** – The Software Solutions Library contains technical documents
- **ONLINE PRODUCT DOCUMENTATION** – Up to date documentation, sample projects, and training tutorials
- **KNOWLEDGE BASE AND FAQ** – Tips to better utilize Ecolane in operations situations

Additionally, customers can submit, view and check the status of support requests at any hour of the day from [helpdesk.ecolane.com](http://helpdesk.ecolane.com). Customers can easily utilize these available features of the web, document questions in detail at any hour of the day, and have questions directed to the most appropriate support expert at Ecolane. This is the preferred method for submitting support

requests to Ecolane and based on our experience, 95% of the requests for information with support can be handled in this manner.

The customer support website is available to all customers with active support contracts. Web support should be the first avenue for all customers to explore for help with issues relating to Ecolane before trying to e-mail or telephone support.

## E-mail Support

Technical Support can also be accessed via electronic mail at [helpdesk@ecolane.com](mailto:helpdesk@ecolane.com). Generally, this is used as a backup in case the customer is unable to access the support website for online issue submission. In general, customers should use the online web submission form located at [helpdesk.ecolane.com](http://helpdesk.ecolane.com). The email is generated through [helpdesk.ecolane.com](http://helpdesk.ecolane.com) then creates a work ticket that in turn is directed to the appropriate technical engineer for resolution. All levels of the Ecolane executive team are then able to track and monitor the progress of the resolution. Unresolved ticket issues are sent as alerts to the executive team for resolution. Also, engineers will be alerted by color-coded messages within the support system that an issue is reaching the end of the support level agreement window. Items are highlighted in yellow and then red as that window horizon is reached.

## Telephone Support

Ecolane Support is available by telephone to receive technical support requests at 888-DRT-EUSA (378-3872). An Ecolane engineer or designated support specialist will answer the call and address customer requests.

### 8.1.1.1 Support Request Procedure

The support request procedure is handled in the following manner:

- **CREATION OF SUPPORT REQUEST** – A support request registered in the Ecolane support system is issued a unique number. Immediately after the support request is registered in the Ecolane support system, an automated e-mail reply will be sent to the requestor as well as to any additional persons if needed.
- **RESPONSE** – When Ecolane Customer Support receives a support request, a support engineer will provide feedback to the customer that the request has been logged and assigned to the appropriate resource. The exact response will vary depending on the support method used by the customer and the response time will commence once the support request has been received and Ecolane has a clear understanding and ability to reproduce or identify the issue at hand (support request) from the system log.
- **ASSESSMENT OF SUPPORT REQUEST SEVERITY** – When a customer has opened a support request and reached customer support, an Ecolane associate will be assigned and assess the severity of the request based on the customer's description of the issue. The severity of the support request will be recorded at [helpdesk.ecolane.com](http://helpdesk.ecolane.com).

Severity	Criteria
Critical	<ul style="list-style-type: none"><li>• Customer's production System is down</li><li>• Ecolane product is inoperable resulting in total disruption of work or another critical business impact</li></ul>

	<ul style="list-style-type: none"> <li>No workaround is available</li> </ul>
<b>High</b>	<ul style="list-style-type: none"> <li>Major feature/function failure</li> <li>Operations are severely restricted</li> <li>A workaround is available</li> </ul>
<b>Medium</b>	<ul style="list-style-type: none"> <li>Minor feature/function failure</li> <li>The product does not operate as designed, minor impact on usage, acceptable workaround deployed</li> </ul>
<b>Low</b>	<ul style="list-style-type: none"> <li>Minor issue</li> <li>Documentation, general information, enhancement request, etc.</li> </ul>

- TARGET RESOLUTION** – Based on the severity of the support request the target resolution time and solution will be provided according to the agreed Service Level Agreement.

Severity	Target Response	Target Resolution	Solution
<b>Critical</b>	<b>1 Business Hour</b>	Within 4 hours from actual response	<ul style="list-style-type: none"> <li>A satisfactory workaround is provided</li> <li>Product patch is provided</li> <li>Fix incorporated into a future release</li> <li>Fix or workaround incorporated into Solution Library</li> </ul>
<b>High</b>	<b>8 Business Hours</b>	Within 36 hours from actual response	<ul style="list-style-type: none"> <li>A satisfactory workaround is provided</li> <li>Product patch is provided</li> <li>Fix incorporated into a future release</li> <li>Fix or workaround incorporated into Solution Library</li> </ul>
<b>Medium</b>	24 Business Hours	Within 15 Business Days	<ul style="list-style-type: none"> <li>The answer to the question is provided</li> <li>A satisfactory workaround is provided</li> <li>Fix incorporated into a future release</li> <li>Fix or workaround incorporated into Solution Library</li> </ul>
<b>Low</b>	72 Business Hours	Within 30 Business Days	<ul style="list-style-type: none"> <li>The answer to the question is provided through FAQ, Knowledge Base, or through trained customer subject matter experts (SME)</li> <li>Fix or workaround incorporated into Solution Library</li> </ul>

- **ESCALATION PROCEDURES** – During the process of resolving a support request, the severity of the request may be increased, and/or a higher level of authority might be notified. The support request severity may be escalated internally when it is determined that the support request involves a time or system critical issue, an incredibly complex issue, or an unreasonable amount of time has passed with no resolution. If a customer is not satisfied with the level of support, they may escalate a given service request to the Director of Support Services of Ecolane.
- **ASSIGNMENT OF SERVICE REQUEST-STATUS** – When a customer contacts Ecolane Customer Support and requests help to resolve a question or an issue, a service request is opened. The following table describes the possible status that may be assigned to a service request.

Status	Criteria
Open	A service request has just been submitted. It may be assigned to an individual or a queue. Ecolane has not responded yet to the customer.
Responded	Ecolane has responded to the customer regarding the receipt of the service request and is actively pursuing a resolution.
On Hold	Ecolane is not actively working on the resolution of the service request. Generally, this is due to information pending from the submitter of the service request. However, service requests may be put on hold for other reasons as well.
More Info Required	Ecolane is waiting for more information to be able to understand clearly, can reproduce, or identify from the system log the issue at hand.
Closed	<p>Closed status reflects that:</p> <ul style="list-style-type: none"> <li>• The customer and Ecolane agree that a satisfactory resolution has been provided, or</li> <li>• The customer understands that there is not a solution to the issue at hand, and the issue is not a result of a product defect, or</li> <li>• Ecolane has made multiple attempts to contact the customer that opened the log, and the customer has not responded.</li> </ul> <p>Electronic service requests (web, e-mail) may be closed when Ecolane Professional Services has provided an electronic reply with a high degree of confidence that the reply will resolve the issue or answer the question.</p>

Before submitting a support request, the following information should be prepared to ensure a timely response and resolution:

- The product module (Reservation, Supervisor, Administration, Reporting, etc.)
- The type of web browser and version and/or the type of MDT unit
- The time when the issue occurred
- The precise workflow that was used when the issue arose
- The exact error message(s) that was displayed on any user interface
- Any attempts to resolve the issue, such as checking the Support Website



## 8.1.2 Continuing Support

As agencies already know or will soon find out, ongoing training and support is the second most important thing after implementation. After all, no one wants to be handed the keys to a fancy car with all the bells & whistles & not be given the manual to use all those tools. Many companies say they have the best training and support, Ecolane can back it up.

We listen to our customers as well. In March of 2017, Ecolane launched an idea portal for our customers to not only share ideas but also vote on the ideas that are posted. Since then, there have been numerous new software feature ideas submitted, thousands of votes placed and there is a multitude of individual conversations between Ecolane's customers and our product development team. The portal also allows for interaction between our customers who learn more and contribute viewpoints to ideas. This portal has resulted in six new features added to the immediate roadmap and much more prioritized for long-term planning.

As stated above, ongoing training is imperative to learn about the ever-changing and is always improving the world of technology. Ecolane offers training webinars on a regular monthly basis to enhance how our transit agency customers use the Ecolane DRT system. We also give agencies the tools to help train new operations staff. There is nothing worse than a new team member at a transit agency who picks up bad habits or bad practices because of incorrect training on how the software is intended to be used. Ecolane training videos aid in consistent positive results. New Drivers/Dispatchers are learning the most current, effective and efficient manner to perform actions within the Ecolane DRT system. Best of all, drivers/dispatchers are watching a video at their pace and can "rewind" as many times as they like. In this manner, your staff will not be duplicating resources for this type of training.

Some quotes from our webinar training:

*"Really enjoyed the webinar yesterday. It gave us a chance to learn things about the Ecolane program that we didn't know about – things that we can use to help make the data cleaner and broaden our understanding of how the different pieces of the software fit together. I also am really glad not to have to travel to Harrisburg or anywhere else for this training. I think the webinars are a great idea and will give more people here an opportunity to learn more information."*

– Delaware County, PA

*"The webinar was very informative... So much involved... learned some new tricks."*

– Krapf Bus, West Chester, PA

*"Thanks so much for hosting the webinar it was very informational and helpful."*

– Knoxville Area Transit, Knoxville, TN

*"Thanks for hosting the webinars. I like the fact that you can summarize the changes ahead of time for us via a webinar. I also think that one hour or less is adequate time for the webinars. I encourage you to continue with the webinars on any forthcoming changes, or topics of interest."*

– Hanover Township, Bartlett, IL

## Web Hosting

Ecolane is a 100% web-based program. No server will need to be installed onsite at the agency. All data is hosted at a state-of-the-art server farm that has a 99.99% uptime. Multiple redundancy servers and separate locations are in place in case a server or the server farm goes down. If this happens, a backup server location will take over, so clients can continue to use Ecolane DRT.

Something to remember as well is that even if the internet goes down, Ecolane DRT will continue to dispatch trips to MDTs. Ecolane is accessible from any web-enabled device and in the case the internet goes down, devices such as smartphones and tablets or a laptop with a cellular air card or a hot spot can be used to access Ecolane DRT, so dispatchers can continue to work until the internet is working again.

## Server Maintenance

Because there is no server hardware installed onsite, Ecolane will maintain the server hardware for all primary and redundant servers. Agencies will not have to worry about having IT staff on hand to manage an on-site server. If there is any hardware that needs to be replaced on the server during the contract at the server farm, Ecolane will handle this as part of the annual licensing fee.

## Map Updates

Ecolane's Professional Services team will update your maps as part of the annual licensing fee. Transit agency staff will also be taught how to update the map between times in case new buildings/offices/facilities are built between updates. All map updates will be coordinated with the agency the same as an upgrade or update to the system will be communicated to the agency.

## Support

Ecolane's Help Desk is not just a site where customers can file tickets. It also includes numerous training videos on how to do different things in Ecolane DRT or how to use the MDTs and has an FAQ section as well.

## Upgrades and Updates

Ecolane will provide standard upgrades and updates according to Ecolane's version plan without charge. Any customization work will be based on a separate agreement. Ecolane includes training for major modifications at no additional cost. Release notes are sent out ahead of time, so agencies can read up on the changes before the training and upgrades occur.

As part of Ecolane's annual license agreement, it will continue to support previous versions of the software until all customers are on the latest version. Specifically, Ecolane does phase roll-outs across their clientele when an updated version is released to ensure everyone is using the same current version while making Ecolane support easier.

Ecolane follows industry standard software development and testing procedures during all phases of product development.

There is no additional cost for Upgrades or Updates. This is included in our All-inclusive annual licensing plan.

### Upgrades

Upgrades are different in the sense that they do not address the two issues, but instead, make an OEM version or Standard version and advance it to the next version release. They are adding more features to your base system.

### Updates (Patches)

In software terms, a patch (or update) is meant to address two issues -- (1) to correct issues within the software that makes it perform less than optimal and (2) to add new compatible

hardware support. The latter is due to the constant development of new features since the launch of our software.

### **Free Monthly training webinars**

Every month, Ecolane's support team provides free webinar training to all customers that wish to attend. Topics are driven by customer requests/feedback and by popular support ticket topics. All webinars and handouts are recorded and uploaded to the Ecolane Helpdesk for all customers to access as needed at any time.

### **Idea Portal**

All customers have access to Ecolane's Aha! Idea portal. The Aha! Idea portal is a site where customers can post ideas for new features or suggest ways to update the functionality of current features within Ecolane. Customers also can vote, interact and provide feedback on ideas posted by other customers on this site as well.

# Response to National Cooperative Purchasing Alliance (NCPA) RFP for Transportation Software Solicitation #: 06-19

## **NCPA Region 14 Education Service Center**

Tab 9 – Required Documents



## A NOTE ABOUT CONFIDENTIALITY

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## 9 Required Documents

## Clean Air and Water Act & Debarment Notice

I, the Vendor, am in compliance with all applicable standards, orders or regulations issued pursuant to the Clean Air Act of 1970, as Amended (42 U.S. C. 1857 (h), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15 as required under OMB Circular A-102, Attachment O, Paragraph 14 (1) regarding reporting violations to the grantor agency and to the United States Environment Protection Agency Assistant Administrator for the Enforcement.

I hereby further certify that my company has not been debarred, suspended or otherwise ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension", as described in the Federal Register and Rules and Regulations

Potential Vendor	<u>Ecolane USA, Inc.</u>
Print Name	<u>Ryan J. Larsen</u>
Address	<u>940 West Valley Road, Suite 1400</u>
City, State, Zip	<u>Wayne, PA 19087</u>
Authorized signature	<u></u>
Date	<u>3/10/19</u>

## **Contractor Requirements**

### **Contractor Certification Contractor's Employment Eligibility**

By entering the contract, Contractor warrants compliance with the Federal Immigration and Nationality Act (FINA), and all other federal and state immigration laws and regulations. The Contractor further warrants that it is in compliance with the various state statutes of the states it is will operate this contract in.

Participating Government Entities including School Districts may request verification of compliance from any Contractor or subcontractor performing work under this Contract. These Entities reserve the right to confirm compliance in accordance with applicable laws.

Should the Participating Entities suspect or find that the Contractor or any of its subcontractors are not in compliance, they may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

The offeror complies and maintains compliance with the appropriate statutes which requires compliance with federal immigration laws by State employers, State contractors and State subcontractors in accordance with the E-Verify Employee Eligibility Verification Program.

Contractor shall comply with governing board policy of the NCPA Participating entities in which work is being performed

#### **Fingerprint & Background Checks**

If required to provide services on school district property at least five (5) times during a month, contractor shall submit a full set of fingerprints to the school district if requested of each person or employee who may provide such service. Alternately, the school district may fingerprint those persons or employees. An exception to this requirement may be made as authorized in Governing Board policy. The district shall conduct a fingerprint check in accordance with the appropriate state and federal laws of all contractors, subcontractors or vendors and their employees for which fingerprints are submitted to the district. Contractor, subcontractors, vendors and their employees shall not provide services on school district properties until authorized by the District.

The offeror shall comply with fingerprinting requirements in accordance with appropriate statutes in the state in which the work is being performed unless otherwise exempted.


Contractor shall comply with governing board policy in the school district or Participating Entity in which work is being performed

#### **Business Operations in Sudan, Iran**

In accordance with A.R.S. 35-391 and A.R.S. 35-393, the Contractor hereby certifies that the contractor does not have scrutinized business operations in Sudan and/or Iran.

Authorized signature

Date

  
\_\_\_\_\_  
3/18/19  
\_\_\_\_\_

## **Antitrust Certification Statements (Tex. Government Code § 2155.005)**

I affirm under penalty of perjury of the laws of the State of Texas that:

(1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;

(2) In connection with this bid, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15;

(3) In connection with this bid, neither I nor any representative of the Company has violated any federal antitrust law; and

(4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

Company name Ecolane USA, Inc.

Address 940 West Valley Road, Suite 1400

City/State/Zip Wayne, PA 19087

Telephone No. 712-249-6156

Fax No. 712-764-6101

Email address ryan.larsen@ecolane.com

Printed name Ryan J. Larsen

Position with company Senior Vice President

Authorized signature 