

**Board Report**

File #: 2018-0131, **File Type:** Contract**Agenda Number:** 31.

**SYSTEM SAFETY, SECURITY AND OPERATIONS COMMITTEE
JUNE 21, 2018****SUBJECT: ENTERPRISE SAFETY MANAGEMENT SYSTEM****ACTION: AWARD CONTRACT****RECOMMENDATION**

AUTHORIZE the Chief Executive Officer to award a twelve-month, firm-fixed price Contract No. PS43249000 to Cority Software Inc. in the amount of \$1,292,925.80 to develop, configure, integrate, and implement a new Enterprise Safety Management System (ESMS), subject to resolution of protest (s) if any. The ESMS will capture all accident, incident, and injury data and be used to produce state and federal regulatory reports.

ISSUE

Staff is seeking an upgraded safety management system that will allow Metro to meet evolving safety requirements and new/changing state and federal safety laws and regulations. The new system will be integrated with Metro's other complementary operational and support systems, as well as leverage technologies to improve system reliability and provide scalability for Metro's future growth. The ESMS system will replace Metro's Vehicle Accident Monitoring System (VAMS) and TransitSafe systems which have reached obsolescence. The recommended contract award will provide an on premise, self-hosted web application, database server, and mobile application solution and will train the various departmental end-users with the new software tool. Furthermore, all of the existing incident/accident data collected over the past 25+ years will be migrated and integrated into the new software platform so that Metro will be able to operate, manage and use a single system of record for all related incident information.

BACKGROUND

Metro's VAMS and TransitSafe systems are the central repository for all bus and non-bus vehicle accidents, incidents, and injuries. VAMS was developed in 1984 to handle bus accidents and was expanded in 1991 to include rail accidents. To augment the limited VAMS functionality, TransitSafe software was integrated with VAMS and implemented in 2004. VAMS was used for reporting and administrative functions, and TransitSafe was used to capture accident, incident, and injury details. Although TRA Inc., which currently provides Metro's safety system, has upgraded their TransitSafe software to their newer IndustrySafe software, it plans to discontinue TransitSafe support in the next

two years. Metro has continued to use the TransitSafe system for reporting purposes due to the specific nature of Metro's incident reporting requirements.

Over the last 25 years, VAMS and TransitSafe's business logic has been continually upgraded to meet the changing requirements of Metro's business needs and regulatory requirements. Currently, the system captures bus, rail, and non-revenue accident details, personal injuries, all work related incidents, supervisory investigations, field investigations, instructor investigations, hazards, observations, efficiency testing records, audit findings and tracking, inspection findings and tracking, corrective actions, accident review cycle, blind claims, other accident/incident related information, and regulatory reports. The VAMS/TransitSafe systems have now reached obsolescence and discontinued vendor support.

DISCUSSION

Metro seeks to implement a new system that incorporates the latest technology solutions for monitoring and adapting to the evolving safety and regulatory reporting requirements.

The new system will use the most current mobile technology that will allow data entry in the field via mobile tablet. This new mobile capability will improve operational efficiency and effectiveness by allowing enterprise access of incident details across the network anywhere within Metro's facilities. The application will allow the user to incorporate video clips that will better define the incident details.

Cority Software Inc. will be required to configure the software tool to best meet Metro's operational requirements. Cority's staff will reside on-premise to facilitate multi-departmental communication and problem resolution during implementation. On-site presence will also enable the 25-year database integration effort to proceed as efficiently as possible in order to ensure a seamless and complete system implementation.

Since incident/accident data is a critical source of safety and risk management information which is also used to support the disposition of claims against the agency, it is important that Metro maintain a robust and technology capable solution that will best meet the current and evolving requirements from state/federal regulatory agencies.

FINANCIAL IMPACT

Funding for this service has been approved under a capital project (CP 207153) and is included in the FY18 budget under cost center 9210, Information Management - Transit Applications. Since this is a multi-year project, the project manager and the Chief Information Officer will be responsible for budgeting the cost in future years.

Impact to Budget

The funding for this action will be a combination of eligible local sales tax, state and federal operating funds.

DETERMINATION OF SAFETY IMPACT

A safety system is necessary for the collection of post-loss safety incident information in order to comply with regulatory requirement for reporting from the FTA, the CPUC, CalOSHA and other. Accurate reporting post-incident assists in identifying root and contributing causes that can then be prioritized for mitigation using such techniques as retraining, engineering solutions, or procedural changes. In addition, the system will allow us to collect and respond to near miss incidents and hazards identified by front line employees, pre-loss, making possible expedited remediation for an injury or an accident occurs.

ALTERNATIVES CONSIDERED

The Board may choose to not proceed with the contract award. This option is not recommended since Metro's existing systems have reached the end of their useful life and staff desires to upgrade the safety management applications with the latest technology solutions.

NEXT STEPS

Upon approval by the Board, staff will execute the new Contract to Cority Software, Inc. and develop a project management plan and schedule.

ATTACHMENTS

Attachment A - Procurement Summary

Attachment B - DEOD Summary

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Phillip A. Washington
Chief Executive Officer

PROCUREMENT SUMMARY

ENTERPRISE SAFETY MANAGEMENT SYSTEM/PS43249000

1.	Contract Number: PS43249000	
2.	Recommended Vendor: Cority Software, Inc.	
3.	Type of Procurement (check one): <input type="checkbox"/> IFB <input checked="" type="checkbox"/> RFP <input type="checkbox"/> RFP-A&E <input type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order	
4.	Procurement Dates:	
	A. Issued: 7/10/17	
	B. Advertised/Publicized: 7/10/17	
	C. Pre-Proposal Conference: 7/19/17	
	D. Proposals Due: 8/24/17	
	E. Pre-Qualification Completed: 2/10/18	
	F. Conflict of Interest Form Submitted to Ethics: 5/7/18	
	G. Protest Period End Date: 6/22/18	
5.	Solicitations Picked up/Downloaded: 38	Bids/Proposals Received: 5
6.	Contract Administrator: Ana Rodriguez	Telephone Number: (213) 922-1076
7.	Project Manager: Al Martinez	Telephone Number: (213) 922-2956

A. Procurement Background

This Board Action is to approve Contract No. PS43249000 issued to develop, configure, integrate, and implement a new Enterprise Safety Management System. Board approval of contract awards are subject to resolution of any properly submitted protest(s).

RFP No. PS43249 was issued in accordance with Metro's Acquisition Policy and the contract type is a firm fixed price.

Two amendments were issued during the solicitation phase of this RFP:

- Amendment No. 1, issued on July 26, 2017, revised SP-05, Insurance Requirements;
- Amendment No. 2, issued on August 7, 2017, extended the proposal due date to August 24, 2017.

A pre-proposal conference was held on July 19, 2017 and was attended by 10 participants representing eight firms. There were 12 questions submitted and responses were released prior to the proposal due date.

A total of 38 firms downloaded the RFP and were included on the plan holders list. A total of five proposals were received by the due date of August 24, 2017.

B. Evaluation of Proposals

A Proposal Evaluation Team (PET) consisting of staff from Metro's Information Technology Services Department, Risk Management Department, and Metro Operations Department including Service Planning and Scheduling, Bus and Rail Operations, and Maintenance was convened and conducted a comprehensive technical evaluation of the proposals received.

The proposals were evaluated based on minimum requirements and the following evaluation criteria and weights:

- Proven Software Solution 40 percent
- Work Plan/Project Approach 20 percent
- Experience and Qualifications of Contractor and Proposed Personnel 20 percent
- Price 20 percent

Several factors were considered when developing these weights, giving the greatest importance to the proven software solution.

The PET began its independent evaluation of the proposals on August 25, 2017. Of the five proposals received, two proposals were determined to be outside the competitive range and were not included for further consideration. The remaining three firms were within the competitive range and are listed below in alphabetical order:

1. Cority Software, Inc.
2. Intelex Technologies, Inc.
3. Transportation Resource Associates, Inc.

The PET conducted interviews, oral demonstrations and requested clarifications from the firms in the competitive range between September 22, 2017 and January 17, 2018. During the interviews and demonstrations, the firms had the opportunity to present their team's qualifications and demonstrate their proven software solution. The firms also responded to the questions posed by the PET which included their assessment of the implementation challenges and plan to address the challenges and their data migration methodology.

After the interviews concluded, Metro requested additional technical information and clarifications. The clarifications resulted in a better understanding of the firms' project management approach, proposed hosting solutions, and plan to build the required interfaces. The PET finalized the scores on January 19, 2018. The final scoring determined Cority Software, Inc. to be the highest qualified proposer and Metro engaged in further technical discussions and negotiations with the firm from January 2018 through April 2018.

Qualifications Summary of Firms within the Competitive Range:

Cority Software, Inc.

Cority Software, Inc. (Cority) is an organization that specializes in environmental, health, safety and quality software. Cority has over 30 years experience in providing quality software solutions. Their proposed project team includes subject matter experts that have worked on large public transportation implementations such as the New York MTA and the Connecticut Department of Transportation.

Cority's software provided ample out-of-the-box functionality and they demonstrated a user-friendly, configurable system with a supporting mobile application. Additionally, their work plan, and project management approach were confirmed through clarification questions to be in line with Metro's expectations. Their proposal also included the migration of historical data into the new system and their assistance in building interfaces through flat files and application program interfaces (APIs) to be provided by Cority. Cority's software will be an on-premise solution as required by the Scope of Services. Overall, Cority's written proposal, demonstration, and thorough responses to Metro's clarification questions showed that they understood Metro's requirements and are prepared to meet them.

Intelex Technologies, Inc. (Intelex)

Intelex Technologies, Inc. (Intelex), based out of Toronto, Canada has 25 years of experience providing safety management software. Their proposed software solution was determined to meet Metro's needs in terms of the functionality; however, Metro requested a self-hosted, on-premise solution and Intelex proposed Software-as-a-Service, cloud-based solution. Additionally, Intelex proposed a subcontractor to manage the implementation of the software; however, the proposed subcontractor had not managed an implementation for a major transportation agency. Furthermore, staff confirmed that the proposed Project Manager did not have a technical background. Metro requested clarification on the proposed Project Manager's role and Intelex's responded with a multi-pronged project management approach that would shift the ultimate technical oversight to a technical lead. Metro did not feel that this approach would fulfill the requirements envisioned for the Project Manager. Furthermore, Intelex could not confirm that all interfaces specified in the RFP would be built as part of their implementation but would need further information sessions with Metro to be able to price the building of the required interfaces and Metro would need to provide the APIs. Metro did not feel that Intelex understood Metro's needs nor that they provided a proposal that fully addressed Metro's requirements.

Transportation Resource Associates, Inc.

Transportation Resource Associates, Inc. (TRA) is headquartered in Philadelphia, Pennsylvania and is the incumbent provider of Metro's safety system. Although TRA is familiar with Metro's needs and environment, their new proposed software, IndustrySafe, did not appear to be as user-friendly as other proposed solutions and appeared to need some customization to meet Metro's requirements. In addition, the mobile solution was still in development as of the date of the demonstrations and a mobile application was required as part of the Scope of Services. While TRA appeared to understand Metro's requirements, their proposed solution did not best meet Metro's needs.

A summary of the final scores is presented below.

1	Firm	Average Score	Factor Weight	Weighted Average Score	Rank
2	Cority				
3	Proven Software Solution	84.00	40.00%	33.60	
4	Work Plan/Project Approach	90.05	20.00%	18.01	
5	Experience and Qualifications of Contractor and Proposed Personnel	86.50	20.00%	17.30	
6	Price	92.47	20.00%	18.49	
7	Total		100.00%	87.40	1
8	Intelex				
9	Proven Software Solution	78.00	40.00%	31.20	
10	Work Plan/Project Approach	64.70	20.00%	12.94	
11	Experience and Qualifications of Contractor and Proposed Personnel	66.00	20.00%	13.20	
12	Price	100.00	20.00%	20.00	
13	Total		100.00%	77.34	2
14	TRA				
15	Proven Software Solution	62.00	40.00%	24.80	
16	Work Plan/Project Approach	58.03	20.00%	11.61	
17	Experience and Qualifications of Contractor and Proposed Personnel	69.00	20.00%	13.80	
18	Price	36.91	20.00%	7.38	
19	Total		100.00%	57.59	3

C. Cost/Price Analysis

The recommended price has been determined to be fair and reasonable based upon an independent cost estimate, adequate price competition, cost analysis, technical analysis, fact finding, and negotiations.

	Proposer Name	Proposal Amount	Metro ICE	Negotiated amount
1.	Cority	\$1,297,500	\$1,926,080	\$1,292,925.80
2.	Intelix	\$1,195,563		
3.	TRA	\$3,238,738		

D. Background on Recommended Contractor

The recommended firm, Cority, is located in Toronto, Canada, and has been in business since 1985. With over 800 global clients and 250 employees around the world, Cority is one of the industry leaders in their field of environmental, health, and safety software. Their comprehensive work plan, methodology, schedule and above all, user-friendly software will provide Metro with a clear roadmap of how to transition from its legacy systems and move forward with this critical aspect of Metro's operations.

DEOD SUMMARY

ENTERPRISE SAFETY MANAGEMENT SYSTEM / PS43249000

A. Small Business Participation

The Diversity and Economic Opportunity Department (DEOD) did not establish a Disadvantaged Business Enterprise (DBE) goal for this solicitation due to lack of subcontracting opportunities. As confirmed by the Project Manager, this procurement is for a software package, which is proprietary in nature, and the required hardware will be procured, installed and maintained by Metro personnel.

B. Living Wage and Service Contract Worker Retention Policy Applicability

The Living Wage and Service Contract Worker Retention Policy is not applicable to this Contract.

C. Prevailing Wage Applicability

Prevailing wage is not applicable to this Contract.

D. Project Labor Agreement/Construction Careers Policy

Project Labor Agreement/Construction Careers Policy is not applicable to this Contract.