Project MILES: Moving Toward Innovative Mobility Solutions

January 2019

ACKNOWLEDGEMENTS

INTRODUCTION

Project MILES is a collaboration of regional transportation planners, city and county government officials, non-profit agencies, business owners, and service users. This report describes a project by this group to explore potential software solutions for improving access to mobility services for older adults and adults with disabilities residing in non-urban/suburban areas of Larimer County, Colorado.

This project's primary goal is reflected in its title – **M**obility **I**nclusiveness; **L**ocations **E**verywhere; **S**imple (MILES). It envisions a single-point-of-entry mobility management service, often referred to as "One-Call/One-Click", that refers older adults and adults with disabilities to appropriate/available transportation options. This portion of the planning phase creates an inclusive Expert Panel of service users, service providers, caregivers, and systems representatives to conduct pilot tests of software applications and incorporate stakeholder feedback into development of end-use software. This report describes our Panel's approach and what we learned and includes recommendations on service and software needs and preferences.

PROJECT HISTORY

The Senior Transportation Workgroup is leading an effort to develop a comprehensive plan to address unmet transportation needs of older adults and people with disabilities by improving coordination of existing mobility services and providing tools for increasing access and efficiency. This effort arose from a 2017 assessment of the barriers to mobility for older adults residing in unincorporated areas of the county.[1] One recommendation from this study was to develop a centralized call center service with an on-line platform where older adults could book rides and learn more about available transportation options.

This recommendation led to a need to better understand available software options that exist to support such services. The Senior Transportation Workgroup applied for a grant from the National Aging and Disability Transportation Center (NADTC) to examine potential software solutions, typically referred to as mobility management software systems. When this grant was awarded to the North Front Range Metropolitan Planning Organization (NFRMPO) in August 2018, the focus of the Larimer County effort was expanded to a service that addresses needs of all persons who experience barriers to mobility due to age or disability.

The NFRMPO has also recently been awarded a Federal Transit Administration (FTA) Section 5304 grant, which will support the development of a business plan for the proposed call-center service, but funds have not yet been distributed at the time of this writing.

PROJECT PURPOSE

The purpose of this project was to engage older adults, persons with disabilities that prevent them from driving, caregivers, and service providers in an inclusive planning process addressing transportation needs for residents of rural parts of Larimer County who do not drive. Specifically, this project aimed to

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[1] *Larimer County Senior Transportation Needs Assessment*. Prepared for Larimer County through the Larimer County Office on Aging, July 2017. Available at: https://www.larimer.org/sites/default/files/uploads/2017/larimer_county_transportation _needs_assessment_final_071317_wo_appendices_0.pdf

pilot test two mobility management software systems that would support a One-Call/One-Click service. The results of the pilot will inform the broader effort for coordinated services and business plan.

GEOGRAPHIC AREAS OF FOCUS
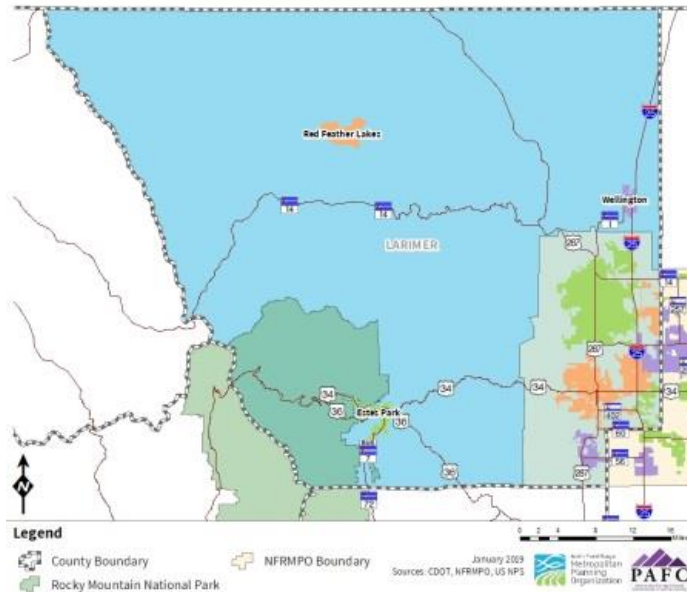
Larimer County is large, encompassing over 2,600 square miles that includes two population centers (Fort Collins, pop. 161,000 and Loveland, pop. 71,000), plains that extend north to the Wyoming border and east to Weld County, and rugged mountains. Unincorporated Larimer County is home to nearly 70,000 residents, a growing percentage and significant number of which are 60 years and older. Reliable and affordable transportation services are sparse to non-existent in these areas. While a future coordinated mobility management service would likely serve the entire county, areas of particular interest to this project include Berthoud, Estes Park, Red Feather Lakes, Wellington, and other parts of unincorporated Larimer County where services are provided, but challenging, and access is limited.

CURRENT SERVICES

The current system of transportation provision in the region is comprised of fixed route, paratransit, and volunteer driver programs, provided through local government and non-profit agencies (for a detailed list of all existing service providers, see the Larimer County Senior Transportation Needs Assessment, 2017). Options in the less populated parts of the county, however, are very limited and often costly. Furthermore, no coordination service currently exists, so individuals seeking transportation must contact each service provider separately to secure a ride.

PROJECT MILES EXPERT PANEL

An Expert Panel representing rider, provider, driver, advocate, and system perspectives assembled in early October to kick off the project and met a total of five times throughout the project period. Concerted efforts were made to ensure that the group was geographically diverse and included representation from mobility planning, city and county offices engaged in planning and transportation service oversight, transportation service providers, military veterans, and people with visual, hearing, and/or mobility impairments and their advocates. Attention was given to making sure all accommodations were made for persons with disabilities to fully participate in the Project MILES planning process. For example, all meeting spaces were wheelchair accessible; transportation was arranged for panelists who do not drive; meeting materials were formatted to ensure compatibility with braille conversion software. These detailed accommodations contributed to a stronger overall process

as Panel members shared their real-life experience encountering mobility barriers and offered insight into rider interests and priorities.

The Expert Panel provided guidance and oversight for the project duration and made direct contribution to the project by participating in two software pilot events. Roles and responsibilities included:

- Provided insight into interests, needs, priorities, and challenges from their various perspectives and areas of expertise;
- Provided input for pilot test planning/logistics;
- Contributed to initial software assessment and selection for pilot;
- Developed criterion to evaluate software options;
- Participated in evaluating two software systems; and
- Reviewed results and made recommendations for next steps.

PILOT PLAN: OUR APPROACH

At the onset of the project, the group discussed the feasibility of conducting a "live" pilot, where riders would be able to use a rider interface or mock dispatch call center service to book a ride, providers receive the ride request and attempt to fulfill it, and the service is delivered as scheduled. Partners who would provide essential services under this approach considered it unfeasible given the timeframe for project completion and limited budget. An alternate plan for a virtual pilot emerged, where members of the Expert Panel would review software demos from one of five stakeholder perspectives: rider/caregiver, provider, driver, dispatch, or system. By incorporating questions for vendors and evaluation criteria that reflected the interests and requirements of all stakeholder groups, the Panel hoped to achieve a comprehensive "first look" at how a coordinated mobility management system might work in our community and be supported by software.

SOFTWARE SELECTION PROCESS

A comprehensive mobility management system has the following desired capabilities: easy-to-use rider interface; a ride aggregator that shows multiple provider options; system can be used to request rides; schedules and coordinates rides; tracks and coordinates in "real time"; and manages billing and payment. Numerous different software solutions have been developed to perform these functions, but no one alternative has all functionality fully built out; the products and industry are changing rapidly as technology advances. Our goal was to examine options that would provide as many of the desired capabilities as possible.

A search for existing mobility management software resulted in a list of twelve possible options. (See Table below for list of software options considered). These proprietary software programs are offered for sale or lease, with additional costs for training and ongoing system maintenance. As the team conducted an initial review of software options, we discovered that, of the proprietary mobility management software solutions reviewed:

- Five of the twelve options under consideration were recommended through consultation with national experts at NADTC, Yaffe Mobility, Transportation for America, AARP, and Colorado transit consultant Suzanne O'Neill;

- Of the six, three (Ecolane, Qryde, and Shaw) software had no local presence or current usage, and were generally aimed toward more urban markets, and were therefore eliminated;
- There was mixed feedback about Trapeze/Tripspark. Trapeze was used locally for dispatch by the Fort Collins Transfort system, but had limited rider-focused features, and compatibility with other systems needed to be created piece-by piece with software adaptations;
- RouteMatch emerged as a frontrunner for the following reasons:
  - It is currently in use locally in Boulder County, Weld County (Greeley), and RTD paratransit (connects to Denver);
  - Multi-provider "hub" implementations already under way in Colorado Springs and other states (Oceanside CA, Sutherlin OR);
  - References in Denver and Longmont gave positive reviews and described the company as a positive collaborator.

During our research, an alternative option emerged that uses open-source code acquired for use by anyone, without licensing fees. Under this scenario, a software company is hired for a fee that covers software developer time to create customized programs or system enhancements, and for system updates as needed (the company may also offer hosting, training, and other services). As we were exploring our options, we received positive reviews of opensource software collaborations underway in Utah and Oregon with Cambridge Systematics, a software development and transportation consulting firm. Contacts with references (current users in Utah and the AARP) revealed positive feedback; the strategy was considered cost effective with lots of "upside", but current utilizers acknowledged that a comprehensive, full-featured mobility management system was still being developed, development was somewhat piecemeal, and features could be "orphaned" or unfinished if they lost their sponsor. Based on this input, the Project MILES Expert Panel concluded that we would review one proprietary software option (RouteMatch) and an approach that uses open-source code (Cambridge Systematics).

TABLE: SOFTWARE REVIEW SELECTION CRITERIA

	RECOMMENDED BY NATIONAL EXPERTS	MEETS LOCAL CRITERIA (RURAL AREA, LOCAL PRESENCE, ETC)	PROPRIETARY	USES OPEN SOURCE CODE
OPEN SOURCE (VIA CAMBRIDGE SYSTEMATICS)	✓			✓
ROUTEMATCH	✓	Yes	✓	
ECOLANE	✓	No	✓	
GMV/SYNCHROMATICS /EASYRIDES	✓	No	✓	
SHAW	✓	No	✓	
TRAPEZE/TRIPSPARK	✓	Mixed	✓	
ASSISTED RIDES				
CTS/TRIPMASTER				
DEMANDTRANS				
MEDIROUTES		Mixed		
PARAPLAN (ENGRAPH)				
QRYDE				
ROUTING BOX				

REVIEW PLAN

A question guide, developed with input from the Expert Panel, was shared with the vendors in advance and used by meeting facilitators and the panel during the review session. Questions were grouped into twelve domain areas and topics of importance from the various stakeholder perspectives (i.e., rider, driver/provider, system).

The following criteria were used as a framework for assessing the features of each software:

1. How well does software address riders' priorities (choice, efficiency, and accessibility cost of ride)?
2. How well do features address our unique needs, including rural access, client data management, reporting requirements, and compatibility/usability for the diverse providers in our community?
3. How well suited is software to adapt as our service (and the entire transportation industry) evolves?
4. How well priced is the product and service (i.e., value of the mobility management solution)?

Reviewers completed a score sheet that allowed them to give both a numeric score and qualitative feedback of how the software performed against each criterion.

WHAT WE LEARNED: MOBILITY MANAGEMENT SYSTEMS

The Expert Panel engaged in two virtual pilot events in December 2018 (one for each "finalist" selected) in accordance with the review plan described above.

SOFTWARE REVIEW ONE: CAMBRIDGE SYSTEMATICS (OPEN-SOURCE APPROACH)

Cambridge Systematics uses open-source software to provide communities with customized solutions to mobility management system needs. Their approach combines existing open-source solutions to the various required functions (i.e., ride acquisition, trip delivery, reporting) to meet unique community needs, and that can integrate with other systems already in place. Cambridge Systematics provides software development/system customization, management (i.e., updates, bug fixes), and user training. As previously discussed, there is no cost to investors for the code used to develop the software; the cost for the system pays for software development and upkeep and could be transferred to another vendor performing similar functions, if desired. Cambridge Systematics are transportation specialists; in addition to software development, they are knowledgeable about the rapidly-changing transportation industry. They have developed software solutions for individual large transportation providers that service entire regions, and have experience working with communities on coordination projects similar to the Larimer County effort.

Members of the Expert Panel participated in a virtual pilot event with Cambridge Systematics on December 14, 2018. The event lasted 2.5 hours, during which the vendor provided an overview of the system and responded to previously prepared questions, and panelists reviewed and scored performance against the four evaluation criteria discussed in the Evaluation Plan section above.

Reviewer score sheets were analyzed for common themes, which are summarized below.

Strengths

Overall, reviewers were impressed by the possibility that Cambridge Systematics could offer a solution that provides transparency of all options available to riders, is highly customizable to meet a variety of provider capacities, appears adaptable as future needs are encountered, and avoids the possibility of investing in the "wrong" software as community needs change and the industry evolves.

Rider interface offers options and accessibility features

Reviewers noted that the system can be set up to display all available service options to riders when they engage with the software (directly, or through a call center/dispatch service) to book a ride. System users can explore ride providers that service the area and make comparisons about advance booking notice requirements, trip cost, and other features of interest. Limited testing using screen reader and braille transcription software indicated that the rider interface is accessible to people with vision and hearing impairment.

Offers features of interest to providers with varying capacities

The system offered features of interest to a variety of provider types. Reviewers were impressed with the ability to set provider parameters, which would help match riders with available and/or eligible services. The system appeared viable for ride providers of varying service capacities. The driver app can be accessed from any tablet or phone if the driver has internet access. For smaller providers whose drivers may not have tablets (for example, volunteer programs), or who are servicing rural areas without broadband connectivity, ride manifests can be printed and shared with drivers.

Is adaptable to the future

Reviewers thought the vendor could provide a solution that could be adapted as our community grows and the transportation industry evolves. Ride providers can be added or subtracted from the system as needed and vast opportunity for customized features was presented. Reviewers noted that the vendor appeared open to new ideas and capable of identifying solutions to issues as they arose.

Weaknesses

Our Panel's perceived weaknesses to the approach offered by Cambridge Systematics included concerns about how well the combined software programs would work together to meet the variety of functions required to meet all system needs, and a lack of ride scheduling functionality.

Few demonstrated successes in rural applications

Reviewers noted that the examples presented by Cambridge Systematics appeared to differ from Larimer County in that they were mostly urban/suburban areas. This raised questions about the software's suitability for rural applications and the vendor's ability to provide solutions to issues unique to rural communities.

Concerns about integration

Reviewers had difficultly envisioning a seamless, coordinated system under this approach since the concept is based on using software that has been developed to meet different aspects of transportation services and combining them according to specific community requirements. The result could be software products with different looks or features that make them less intuitive to users who interface with more than one piece of the system.

Other Observations

Mixed reviews about whether open source is a strength or weaknesses
Some reviewers viewed this vendor's approach using open-source code as a strength. Advantages included the avoidance of "vendor lock", which can be of concern when a contracted vendor of a proprietary software is not meeting community need; usually a significant investment of time and money has occurred, and it can be difficult to decide to change vendors. If Cambridge Systematics was not performing as required, system development and management could be transferred to a different company or capable community partner without significant investment loss or disruption to the service. Additionally, since the software is based on open-source code, reviewers noted our community could benefit from enhancements made by other communities. However, reviewers were concerned that the open source approach introduced long term risk for lack of ownership and responsibility for software performance, growth, and development. They also noted that it may not be easy to find another software company to manage the system created by developers at Cambridge Systematics, if the need arose.

Route optimization not available
No route optimization feature, which would produce computer-generated routes optimized for efficiency and vehicle capacity, has been developed for open source users to date. This was considered neither a strength or weakness at this time, but something reviewers made note of for consideration for a future coordinated system of service.

Reporting features appear adequate
Reviewers noted that the software programs include features that are considered important for tracking services delivered and generating reports, and that it is compatible with other software already in use by some providers.

SOFTWARE REVIEW TWO: ROUTEMATCH (PROPRIETARY SOFTWARE)
RouteMatch Software, Inc (RouteMatch) provides enterprise intelligent transportation systems and mobile data system deployments to public and private transit sectors. Founded in 2000, it offers proprietary software, hardware, and a wireless platform for a wide variety of transportation system types in communities across the country. In addition, it offers customer support, training and education, implementation, consulting, and cloud services, as well as an online portal. Providers in numerous Colorado communities have invested in RouteMatch. RouteMatch also has experience working with coordination projects such as the proposed service in Larimer County.

Members of the Expert Panel participated in a virtual pilot event with the RouteMatch vendor on December 21, 2018. The format and process mirrored the previous pilot event.

Strengths
In sum, reviewers noted that RouteMatch's vast experience and demonstrated success in communities was a strength and the software appeared to have the capacity to address functions considered essential from provider and system perspectives in a single, integrated system.

Trusted and experienced
RouteMatch is an industry leader with demonstrated experience in communities across the country. The vendor provided examples of communities they work with that have similar features to Larimer County, including the diverse range of existing provider size and type. Reviewers expressed trust and confidence in the vendor's ability to provide a product and training tailored to our community's needs.

Provider and system applications highly customizable
Reviewers noted that RouteMatch offers features of interest to providers and systems perspectives which can be customized in numerous ways to meet a variety of needs and preferences. The vast array of options was considered a strength as it appeared RouteMatch would be able to offer a solution to any customization request. Examples noted include generation of frequently requested reports, first mile/last mile tools, features that allow facilities to book rides for their clients (for example, dialysis center or senior center), and parameters such as hours of service, vehicle type, or advance scheduling notice that are unique to each provider.

Offers the "whole package"
RouteMatch offers an apparently seamless solution to the entire range of transportation service needs, including ride discovery, scheduling and dispatch to providers, trip completion, and reporting. Reviewers perceived that this system integration would support the coordinated service our community seeks to achieve.

Already in use in our community with success
RouteMatch is already being used by one provider whose service area includes Estes Park, as well as neighboring communities that service riders in Larimer County (Longmont and Greeley). While other software systems may be interoperable with the solution our community ultimately selects, reviewers considered its existing presence in the region a strength. These RouteMatch users are already functioning with other existing systems and software programs so there is little concern that a larger investment by our community would result in previously unidentified barriers.

Weaknesses
While reviewers were overall impressed with the software's capabilities, the software's rider interface was not as "rider-friendly" as reviewers would have liked to see.

Rider interface could use improvement
Reviewers noted that the software was not able to offer features important from the rider perspective. Reviewers found that the software is not accessible to persons with visual impairments (accessibility for other impairments not assessed) and does not meet compliance standards established by the Americans with Disabilities Act (aka, "508 compliance")[2]. The rider interface is not compatible with at least one common text to speech/screen reader application; thus, visually impaired riders would require assistance to schedule rides. Additional information is needed to understand how persons with other types of disabilities would be affected. Furthermore, riders are seeking transparency of ride options, including cost, advanced planning required, etc. In RouteMatch, the rider view is limited to

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[2] Reviewers did not note whether the rider interface offered by Cambridge Systematics complies with 508 standards; while noted as a weakness for the RouteMatch software, lack of 508 compliance should not be considered a weakness in comparison with any other mobility management software without additional inquiry.

pre-determined provider options at new client data set up. Virtually all reviewers noted this weakness, and at least one reviewer stated they would not recommend this software as a result.

Other Observations

Incorporates route optimization
Reviewers noted that RouteMatch offers a route optimization feature. This feature provides the most efficient route for the requested trips to reduce the occurrence of duplicate trips and empty seats and has the potential to increase service capacity without additional vehicles or drivers. As discussed above, it is unclear whether this feature will be useful to our community and may depend on how the coordinated service is structured.

Mixed reviews on future-focus/forward thinking vs. "dinosaur"
Reviewer perceptions were mixed about whether the proprietary system offered by RouteMatch was outdated or future-focused. Some reviewers expressed concern that RouteMatch was outmoded and based on old, historical models for transportation that don't consider advances in culture and technology. Other reviewers noted that the vendor appeared to be "future-focused" and able to adapt to industry changes.

OTHER LESSONS, SUCCESSES, AND LIMITATIONS

- Our community would benefit from coordinated ride services, but numerous questions remain. Some questions this project was not able to answer include:

    o How would ride scheduling be managed by a coordinated ride service? Will the service follow a clearinghouse model (i.e., offer information only) or serve as a hub for providers to "exchange" rides? Issues that need to be addressed include the potential for competition among providers, and possible duplication with existing ride scheduling systems.

    o What will the software system cost, and how does it compare with other available options? While we were able to obtain some general price information, true cost was difficult to assess without a clear understanding of what features are needed to support the future service.

    o How completely will accessibility concerns be assessed?

    o What IT/technical issues remain?

- Our existing providers and ride services have various capacities, in both service and ability to participate in a coordinated system using a shared software system. Some providers are already invested in a sophisticated software system, while others may be reliant on simple methods for scheduling and communicating with volunteer drivers. All are providing valuable services in our community, and all capacities need to be considered for a viable solution.
- An incremental approach to developing a coordinated service is most likely to result in success. Stakeholders agreed that a limited pilot using a call center would be useful to work through complex coordination concerns.

- Options for software systems that will meet our community's need are available. The final, long-term selections will be made through an RFP process from Larimer County or a related agency.
- Accessibility issues must be addressed in order to meet rider needs. Ride services exist for people with limitations due to age or disability; these limitations need to be addressed for the service to function as intended. Both software and service features must be designed to reduce barriers for persons with vision, hearing, and mobility limitations.
- Rural connectivity is an issue that cannot be solved by software. All software services with real-time driver information transfer will require internet and/or satellite service. A One-Click/One-Call service will need to have processes in place to address the needs of riders who reside in and drivers traveling to rural areas with limited connectivity.

RECOMMENDED NEXT STEPS FROM THE EXPERT PANEL

The Project MILES Expert Panel supports the vision of the Larimer County Senior Transportation Needs Assessment (2017) that a One-Call/One-Click center and mobility management software solution would help improve rural transportation solutions in Larimer County, and that there are at least two options (RouteMatch and open source code with a supporting vendor like Cambridge Systematics) which could move us toward a solution. The Panel offered three specific recommendations towards this end:

Recommendation #1: Our community should implement a limited proof of concept project prior to investing in a mobility management software system.
The Expert Panel strongly supports Larimer County continuing to improve rural transportation options, but they recommend proceeding carefully and incrementally to avoid wasting valuable time and limited resources. The Panel unanimously endorses the idea of a limited scope implementation in parts of Larimer County as proof-of-concept before committing to a full-scale, long-term implementation.

Recommendation #2: The NFRMPO should submit a response to the NADTC request for proposals (RFP) for implementation funding support.
The NADTC is offering one-time implementation funding support to planning grant recipients. Based on the success of Project MILES, the Expert Panel recommends that the NFRMPO request funding support to implement the limited proof of concept project discussed above.

Recommendation #3: The Project MILES Expert Panel should merge with the Larimer County Mobility Committee (LCMC).
The Larimer County Mobility Committee (LCMC) is an existing and ongoing forum for transit providers, human service agencies, and members of the public to discuss needs, to network, and to find creative solutions to mobility issues. The LCMC is expected to serve a key role in developing the coordinated service concept and business plan using the FTA 5304 grant funds awarded to the NFRMPO. Project MILES Expert Panel members can contribute valuable insight based on their experience with this project and varying perspectives on future service needs.

ADDITIONAL READING

Larimer County Senior Transportation Needs Assessment. Prepared for Larimer County through the Larimer County Office on Aging, July 2017. Available at: https://www.larimer.org/sites/default/files/uploads/2017/larimer_county_transportation _needs_assessment_final_071317_wo_appendices_0.pdf

LIST OF ATTACHMENTS

Attachment A: Project MILES Expert Panel Roster

Attachment B: Evaluation Plan and Question Guide

ATTACHMENT A: PROJECT MILES EXPERT PANEL ROSTER
January 2019

Facilitators: Jim Becker, becker.jk@gmail.com
                  Christy Bush, cbushconsultingllc@gmail.com

Name	Affiliation
Alex Gordon	NFRMPO (system)
Angela Woodall	Foothills Gateway (system/ride provider)
Annabelle Philips	City of Fort Collins/Transfort (ride provider)
Bill Hanlon	Community volunteer/Wellington Senior Resource Center (system/rider advocate)
Brian Wells	Town of Estes Park/Estes Park Shuttle (ride provider)
Connie Nelson-Cleverly	SAINT (ride provider)
Greg Goettsch	Qualified Listeners (rider advocate)
Gregg Seebohm	Community volunteer (rider)
Janice Crow	RAPT DEV (ride provider)
Jason Brabson	Heart & Soul Paratransit (ride provider)
Jill Couch	Pro-31 Safe Senior Driver (rider advocate)
Joanne Vande Walle	Community volunteer (system/rider advocate)
Kaley Zeisel	City of Fort Collins/Transfort (ride provider)
Katy Mason	Larimer County Office on Aging (system)
Liam Sawyer	Community volunteer (rider)
Lisa Bitzer	Via Mobility (ride provider)
Mary Kelley	Elderhaus (system/ride provider)
Megan Kaliczak	zTrip (ride provider)
Ruth Fletcher-Carter	Berthoud Rural Alternatives for Transportation (RAFT) (ride provider)
Vera Pruznick	Community volunteer (rider)

Evaluation Criteria

1) How well does software address riders' priorities (choice, efficiency, and accessibility cost of ride)?
2) How well do features address our unique needs, including rural access, client data management, reporting requirements, and compatibility/ usability for the diverse providers in our community?
3) How well suited is software to adapt as our service (and the entire transportation industry) evolves?
4) How well priced is the product and service (i.e., value of the mobility management solution)?

Scoring Method

Reviewers will use a 5-point Likert Scale to score software performance for each of the four criteria. Scores will be recorded using the attached Scoring Tool. Scores for each criterion will be summed to achieve a final score; each software can earn a maximum score of 20. Reviewer scores will be aggregated and analyzed.

Software Review Questions by Domain

1 Choice

- Are riders offered <u>all</u> choices available to them at any given time?
- Do choices offered include adequate information (time, price, convenience, etc.)?

2 Efficiency

- How easy to book a single ride? To schedule recurring rides?
- How many "clicks" to complete a reservation?
- What features enhance efficiency for riders?
- What features enhance efficiency for schedulers?
- What features enhance efficiency for drivers/operators?
- Does in connect with many modes of transportation?

3 Accessibility

- Overall Ease of use
- How do riders interface with the system? Website? Mobile app? Phone?
- Which features ensure accessibility for riders with limitations (vision or hearing impaired, etc?)

4 Interoperability

- Does software integrate with MS Access and Excel and SQL database?
- Would we have direct access to the database?

- What mapping software does your software interface with? Do we have to pay for a map of our service area?
- Does product support open access software platforms?

5 Rural Access

- How is the software affected by areas that may have spotty mobile/broadband reception (at home/destinations? On roadways?)
- If internet connection is lost, will the software still work (for riders; For schedulers; For drivers)?
- To work well, how much burden is on live contact (phone calls, how much is on software (app or online)?

6 Client Database

- How is client data imported? How is it managed/kept current? How is it kept secure?
- How detailed are rider profiles and preferences? How easy to update or override?
- Is information on riders saved an automatically accessed?
- Is fare/payment management included? How detailed/comprehensive? Security/privacy?

7 Price/Value

- What is included in the base price? How is pricing structured? By population size? Per module? Number of licenses?
- What happens to pricing as we grow?
- Is there an initial set-up fee? If we add modules later, will there be additional set-up charges?
- Does your price include live training (and/or by web-cast)?
- If we need extra training is there additional cost?
- What needs to go with this software to make it a good value for cost?

8 Phasing

- What options for phasing are offered (can various "modules" e.g. fare & billing be added later)?
- How are updates handled

9 Security

- Is overall security adequate? Is the system HIPAA compliant? How is sensitive client information protected?
- Are security updates included?

10 Reporting

- What is included in standard reports?
- Are custom reports offered? What is the price?
- Is technical assistance available for report preparation?

11 Technical assistance and software maintenance

- What is covered in annual maintenance? Does it include software updates? Upgrades (enhancements or new features?)
- Can we call and talk to a person immediately? How long can we expect to wait to have an issue resolved?
- How often is software updated? How much downtime for software updates?
- What kind of transportation experience do the trainers have? Do they have experience with operations or dispatch aside from your software?

12 Equipment/technical specifications

- Is software "cloud hosted" or "self hosted"? How does this affect us?
- Do specs align with proposed industry standards?
- Does the system require that drivers use tablets and/or data plans and/or other connectivity? Doe the system support the optional use of driver tablets or cell phones
- What are the details of specifications and connectivity?
- If there are system requirements, what is the make, model, and size of tablets/requirements, and how much do they cost?