Sacramento Area Council of Governments

STATEMENT OF WORK

SACTrak Project Database

I.   INTRODUCTION

I.A   Purpose

The Sacramento Area Council of Governments (SACOG) requires a database management system for development, tracking, reporting, and mapping of projects and associated funding in the Metropolitan Transportation Improvement Program (MTIP).

SACOG currently relies on Software as a Service (SaaS) to support "SACTrak," a transportation programming project database used to manage a federal transportation improvement program. SACTrak provides a critical link between SACOG and our local project sponsors via a web-based interface which allows registered users the ability to add and modify transportation projects intended for inclusion in the Metropolitan Transportation Improvement Program (MTIP). SACTrak also maintains a historical record of revisions to the database and all past projects. Included in the database are features allowing for the direct interaction with state and federal transportation funding databases. SACTrak provides the ability to generate many reports required to support the management of the programs.

This statement of work defines the effort to provide a software solution for SACOG. The work will be carried out by EcoInteractive, Inc.

I.B   Background

SACOG is the federally designated Metropolitan Planning Organization (MPO) for the counties of El Dorado, Placer, Sacramento, Sutter, Yolo, and Yuba. MPO's are charged with maintaining and conducting a "continuing, cooperative, and comprehensive" regional transportation planning and project programming process for the MPO's area.

I.C   Staff Contact Information

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II.   PROJECT SCOPE

II.A   Scope of Work

The vendor will provide an electronic Transportation Improvement Program system and provide website hosting and continued technical support.

Vendor will continue to service and maintain SACOG's fully developed and currently active SACTrak platform that can be quickly enhanced to meet SACOG's specific evolving needs. In addition, EcoInteractive will upgrade SACOG to the new ProjectTracker platform. The upgrade will begin in January 2025, and the final transition over to the new platform will occur in September 2025.

II.B   Software Requirements

The current software platform will include the following:

1. Secure User Login & Account Management – Provides registration and login user experience while maintaining high security for all stakeholders.

2. User Profile Manager - Allows admin staff to modify any user's access to various datasets, screens, and reports.

3. Project Management - Enable project managers to track information and funding for individual project versions for a specific adoption or amendment. Includes spell check and other quality assurance features. Update and standardize individual fields and values as their business practices evolve. Provide dynamic data validation and alerts so that users can correct data as it is entered.

4. Electronic Submission - Tools for local agencies to electronically submit new projects, carry-over projects, or amend projects. Transparent interactions between agencies as data moves through approval business processes.

5. Review & Notification of Electronic Submission – Tools to enable MPO and DOT staff to review changes to project data submitted by project lead agencies. Streamline the review process by highlighting new changes to the project. Automatically generate a text summary of all changes to the project. Include automated email notifications.

6. Adoption Manager Tool – Track the progress of all Long Range Transportation Plan (LRTP) and Transportation Improvement Program (TIP) adoptions. Provide status and summary information for each project from the previous document cycle. Compile a new LRTP and TIP adoption.

7. Financial Constraints Reporting - Provides easy real-time financial analysis to manage and track total revenues, programmed, and remaining balance for funds. Provide real time alerts to users to prevent "over programming" of funds.

8. Responsive and user-friendly search tools - Search screens with less than 1 second response time to search through over 100,000's of records. Fields will be specified that will be included in the search tool features.

9. Robust, scalable performance - Proven performance and capacity to fully support 1000's of users and varied levels of user access.

10. Automated data sharing - Compatible with and able to share data with other internal data systems.

11. Auto-import Metropolitan Transportation Improvement Program information from SACTrak into Caltrans' CTIPS system.

12. Training & On-line Tutorials – EcoInteractive to provide online tutorials as a standard feature to support and guide users in how to utilize the new system. During the initial implementation phase, a "train the trainer" model will help train key staff who will in turn support other users and relevant agencies in using the new software.

13. Reporting Module - Wide array of web enabled reports, dashboards, graphs, and PDF reports, which includes funding and financial summaries such as Financial Constraints Report, Programmed Dollars Report among others. Include filters to limit report data by dates, fund type (i.e. constrained and unconstrained), lead agency, county, status, and other common fields, hyper-linked (hot linked) drill-down features, the ability to click on report column headings to perform a "sort" on the data, and a download to a spreadsheet feature.

14. Document Tracking Module – Feature to upload and immediately share electronic documents and provide document management and archiving of documents.

15. Obligation Tracking Module - Automated process to import nightly data from FMIS and/or other state and federal databases as available.

16. Project Delivery - Solicit, report and manage project delivery milestones by project sponsors at a regular cadence configurable for SACOG. SACOG will have the ability to configure different milestones with sub-tasks, and the tracking of originally scheduled dates vs. actual completion dates with tracked changes and fully retained history of delivery updates. Admins can utilize the companion web-based report to streamline the review of project delivery status across their entire portfolio of projects

17. Performance Measures Module - Solicit, manage and track performance measure goals and targets on projects within transportation programs.

Once the software is upgraded, the following features will be included:

18. Self-service configuration panel for system admins to modify frequently changed values such as fund types, lead agencies or project IDs (i.e. add new fund type, mark an old one as historical).

19. The ability to completely customize reporting queries and interfaces on standard reports. All users can query reports using custom filters with custom filter values, as well

as customize their own view of query search results by adding and modifying what fields/columns are displayed. As long as a field is tracked within ProjectTracker - any user can add that field as a custom search filter, or as a custom display field, to any standard reports on the platform.

20. The ability to create and save an unlimited number of custom filter settings to run by default on reports. Each user can customize what set of filters they like different reports to be run on, and save them as default filter settings so each time they log in to the platform - they can run the reports on their own preferred default settings.

21. The ability to easily self-service the setup of different performance measure questions for different adoption cycles, with retained history of previous questions and answers from all prior cycles.

22. Easily setup a long range plan module to track the LRTP, with distinct questions for the LRTP cycle, carry-over relevant project data in between the TIP and LRTP plan with a few clicks, and track the entire history of project movement in between plans.

23. Ability for staff to self-service the creation of new plan cycles at any time, vs. requiring the help desk team to set up a new plan cycle.

24. Ability to manage unlimited number of plan cycles at the same time, vs. only limited to two plan cycles at any given time.

25. Ability to amend a project in more than one revision at a time i.e. ability to revise air quality data in CMAQ amendments while making project updates in other sections in regular amendments.

26. More flexibility in assigning user access. For example, a user could be a sponsor for one agency and an administrator for another. Or could be an administrator for the LRTP but read-only for the TIP.

27. The ability to track and manage granular project relationships across plans and programs i.e. splitting projects, indicating group/sub-project relationships.

28. Public Web Site Module - An integrated public web site. Ability to select which pending or draft TIP documents they would like to make available to the public for public commenting. The public web site module is also available as mobile web pages for searching and viewing of FTIP data on mobile devices. The public website module will contain a standard set of functionalities that will appear to be seamlessly integrated into the client's website property, and automatically reflect updated project information entered by agencies in prior modules behind a secure access login. Members of the public will be able to easily review project information in the TIP. A variety of search tools are provided to enable querying of data by many criteria such as county, lead agency, fiscal year, funding program, project type, project description, etc.

II.C   Import Historical Data

Vendor will work with SACOG to import all historical data from the current SACTrak database to the new database. SACOG may provide GIS data or other datasets for individual projects for import as well.

II.D   Deploy Software

SACOG will remain on the current software version until the final transition of all data and features. Transition to the new software will begin on January 2025 and will conclude nine months after. Vendor will continue providing software as a service for the remainder of the contract.

II.E   Provide Documentation and Training Support

Develop on-line training tutorials (in lieu of documentation and operational manuals) for SACOG staff and local agencies.

Provide up to two (2) - four (4) hour training sessions.

II.F   Provide Help Desk Support

Vendor will provide an annual package of hours for Help Desk support and maintenance to assist in standard usage and meet changing user requirements for duration of the contract, maintenance hour tasks will include:
-   User support questions
-   Valid value updates (e.g., lead agency, fund type, document type, district)
-   Staffing updates (e.g., admin contacts, notification emails)
-   TIP cycle refreshes for public and secure sites
-   GIS road layer updates
-   Infrastructure and software upgrades plus patches (no client IT or QA required)
-   Performance and security enhancements to software platform infrastructure
-   Annual support hours will be up to 120 hours on the current SacTrak platform. After upgrade to the new ProjectTracker platform, annual support hours will be up to 40 hours.

II.G Fee Schedule

SACOG and the vendor agree to the following fee schedule.

Base Software and Selected Modules	Year 1*	Year 2	Year 3	Year 4	Year 5	5-Year Total
Base Software Price	$94,176	$116,402	$119,895	$123,492	$127,197	$581,162
One Time Upgrade Cost	$41,010	$20,505	$-	$-	$-	$61,515
Module - Long Range Plan	$-	$-	$-	$-	$-	$-
Module - Integrated Public Website	$2,500	$5,150	$5,305	$5,464	$5,628	$24,046
Module - Project Delivery	$3,500	$7,210	$7,426	$7,649	$7,879	$33,664
Total Price	$141,186	$149,267	$132,626	$136,605	$140,703	**$700,386**

*Fiscal Years are July 1 to June 30 except for Year 1 which is Sept. 1 to June 30.

Optional Modules	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
Call for Projects	$1,500	$3,090	$3,183	$3,278	$3,377	$14,427
Integrated GIS	$2,500	$5,150	$5,305	$5,464	$5,628	$24,046
Reporting Database	$2,500	$5,150	$5,305	$5,464	$5,628	$24,046
API Access	$2,500	$5,150	$5,305	$5,464	$5,628	$24,046
ArcGIS - Auto export out	$1,000	$2,060	$2,122	$2,185	$2,251	$9,618
ArcGIS - Auto import in	$1,000	$2,060	$2,122	$2,185	$2,251	$9,618
Project Prioritization	$5,000	$10,300	$10,609	$10,927	$11,255	$48,091
Total Price	$16,000	$32,960	$33,949	$34,967	$36,016	**$153,892**

The below table contains the one-time, professional service fee for migrating custom features in SACTrak to the new ProjectTracker platform. Billing will start the month of project kickoff (no earlier than January 2025), and the total cost will be evenly spread out over 9 months. Professional service fees for any feature development that is beyond the current scope listed below will be billed at $200/hr

Summary	Notes	Hours	Cost
Business Meetings	Included as part of upgrade	0	$0.00
Requirements Audit	Included as part of upgrade	0	$0.00
Data Mapping Connection	Included as part of upgrade	0	$0.00
Infrastructure Setup	Included as part of upgrade	0	$0.00
Uploads to CTIPS	Included as part of upgrade	0	$0.00
Group Projects	Included as part of upgrade	0	$0.00
Data Migration	Included as part of upgrade	0	$0.00
Standard Reports: - Manage Revenues By Fund Source - Financial Constraints - RTIP Amendment Report - RTIP Project Report - RTIP Programmed Revenue by Fund Source - RTIP Amendment Change Report	Included as part of upgrade	0	$0.00
Migration of custom features that include but are not limited to: - Manage Revenues and Financial constraints grouped by funds - List of Projects by Exempt Category - Lump Sum Project Report - Amendment Report 2 - Adoption Summary Report - Amendment/Adoption Summary of Changes Report - Amendment/Adoption Model Run Summary - Custom PCTPA Report - CMAQ Emission Benefit Report - Modified History - Funding History - All Versions from Project Page - Automatic ID Generation		473.19	
Hours Total		473.19	
Hourly Rate	$130.00		
Total Cost			$61,515

III.   TERMS & CONDITIONS

III.A   General Terms of Project

The contract will be an agreement between SACOG and the vendor. SACOG will provide contract administration services. The vendor will invoice SACOG for services rendered and SACOG will compensate the vendor for these services as set forth in the agreement. Funding for the vendor services will be provided by SACOG. The SACOG Board of Directors will award the contract and project deliverables will be reviewed by the SACOG Project Manager.

III.B   Staffing Resources

All communications will be carried out through the following designated coordinators.

Role	Responsibilities	Name / Role / Contact
Executive Sponsor	• Point of escalation. • Approves all changes to project scope.	Jessie Yu Chief Executive Officer jyu@ecointeractive.com Davis, CA
Engagement Manager	• Primary point of contact. • Responsible for project success. • Coordinate communication with technical team about project deliverables. • Provide guidance / training of standard product. • Responsible for documentation of customizations, prioritization, and project requirements.	Mark Chavez Customer Success Manager mchavez@ecointeractive.com Sacramento, CA
Technical Team	• Responsible for maintenance of existing system. • Responsible for technical implementation of module add-ons. • Provide technical feedback on configuration requests.	Evan Scarisbrick Head of Product / Sr. Developer Sacramento, CA Vo Tran Sr. Developer Sacramento, CA

III.C Verbal Agreement of Conversation

No prior, current, or post award verbal conversations or agreement(s) with any officer, agent, or employee of SACOG shall affect or modify any terms or obligations of the resulting contract.

III.D Contract Arrangements

The vendor is expected to execute a contract similar to SACOG's Standard Agreement, which meets all State and/or Federal requirements.

III.E Payment Schedule

The vendor will be paid in arrears, based upon the payment schedule agreed to in the contract. The consultant should forward a copy of all invoices for payment for work performed and associated expenses by the 15th day of the following month. At SACOG's discretion, SACOG may withhold ten percent (10%) of the payments until the successful completion of the project and the delivery and acceptance of all final products.