



Authorize Extension of Subscription to Software Platform Hosting Project Performance Assessment Tool

Consent

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Attachments: No

Approved by: James Corless

Referring Committee: Policy & Innovation

1. Issue:

Staff is seeking authorization to extend SACOG's subscription to the software platform that hosts the Project Performance Assessment (PPA) tool.

2. Recommendation:

The Policy & Innovation committee recommended that the SACOG Board authorize staff to extend SACOG's subscription to the VertiGIS software platform for five years, approve a total contract budget of \$189,325, and authorize the executive director to negotiate and execute the contract amendment.

3. Background/Analysis:

The SACOG board has steadily increased its focus on prioritizing cost-effective transportation projects with high performance benefits. In response, the board directed staff to develop tools and methods to analyze transportation investments at the project-level. SACOG's PPA tool stems from this direction and a nine-month regional working group's technical review of performance assessment methodologies. The PPA tool links the numerous data sources SACOG tracks and maintains with key policy objectives and outcomes of the region's long-range plan. The PPA tool is online and available for anyone to use, thus serving as a more accessible complement to the agency's travel demand model, which requires specialized software and long run times.

The PPA tool's outputs have served as a cornerstone in the following efforts:

- Awarding funding in the past four regional funding rounds, whose submitted applications totaled over \$1.2 billion in requests.
- Awarding \$34.5 million from Green Means Go to support catalyzing infill projects.
- Supporting applications to the state Active Transportation Program, SB1 competitive cash, and other discretionary funding programs.

In short, the tool is a vital component of the agency's performance-based transportation planning and programming, and staff continue to work with partners around the region to expand the tool's use in other activities.

4. Discussion/Analysis:

Since its initial rollout in 2018, staff have continually assessed the tool's effectiveness and researched ways to

continuously improve the tool, including:

- Listening to feedback provided by SACOG staff, project sponsors, and other tool users.
- Reviewing other project-level performance tools and learning about the state of practice, including work at peer Metropolitan Planning Organizations.
- Reaching out to multiple firms in the data visualization, aggregation, and online hosting space for feedback on tool design.

This feedback and research culminated in choosing the VertiGIS online platform for hosting the tool for the 2023 funding round. Key features of the VertiGIS platform that improve upon previous tool versions include:

- Interactive charting that enables project reviewers to quickly and intuitively compare projects on any of the PPA tool's performance metrics. Project reviewers in the 2023 funding round found this feature particularly useful in helping them evaluate projects.
- Sending reports to users via email, rather than requiring them to stay on the tool web page while the tool processes information.
- Flexibility and expandability to accommodate changes in response to user feedback and changing analytical needs.
- Flexibility to create custom reports based on specific needs of individual programs.

In August 2023, the board approved the revisions to SACOG's Procurement Manual to include procurement of software products. The policy allows for the extension of software contracts up to an additional 5-year term for a total of 10 years to prevent disruption of day-to-day operations and to reduce costs associated with implementation and training associated with new software. This policy applies retroactively to all existing software procured within the last five (5) years and all future procurements of Software by SACOG.

SACOG's current subscription to the VertiGIS platform expires on December 31, 2023. With the board approval of the revised Procurement Manual, VertiGIS meets the requirements of the procurement of the software products.

As such, staff is seeking board approval to amend the agreement to extend the VertiGIS subscription for an additional five-year term in the amount of \$85,000. This amount would cover the VertiGIS subscription at \$13,750 per year with five percent annual increase, plus \$9,050 for incidental developer costs. Given this is an estimated cost, SACOG staff also request authorization for SACOG's Executive Director to approve an additional 10 percent (\$8,500) in case the final price is slightly higher than the quoted estimate.

Adding the \$85,000 cost described above to the current VertiGIS contract amount would result in a revised total contract amount of \$189,325. This \$189,325 total cost includes the following:

- \$104,325 for the original contract, which included:
 - \$78,825 in initial development costs and SACOG staff training costs
 - \$25,500 for a two-year subscription
- \$85,000 for the five-year extension, requested in this staff item.

5. Fiscal Impact/Grant Information:

Staff costs supporting this effort are included in the Fiscal Year 2023-2024 budget adopted by the board. The requested subscription would add approximately \$13,750 per year (plus estimated 5 percent annual increase) to be incorporated in the next overall work program budget. The agency can accommodate this extra expense through revenues to support ongoing software and licensing.

