Commuter Wallet RFP Development

Scope of Work – MTC Draft March 24, 2016

Introduction

The City of Palo Alto seeks to develop a “commuter wallet” payment solution which would allow users to plan trips, pay for the associated parking and transportation services, and receive and store various commuter benefits via a single point of interface. The goal of the commuter wallet solution is to incentivize the user to make commute choices that minimize single-occupant vehicle travel, and to collect data on the impact of transit and commuter incentives on travel behaviors.

The City is seeking a qualified service provider to develop a comprehensive scope of work for the project; this scope would be used to solicit recommended vendors to provide, modify or build the wallet solution. The service provider will be tasked with performing research on existing similar systems both locally and in other regions, providing an in-depth analysis of the payment capabilities of the transportation and parking services referenced within the RFP, information on best practices for incentivizing travel decisions, and developing a comprehensive scope of work which assimilates all of this information to develop the best product. Although the commuter wallet is envisioned as a mobile phone application, the City is concerned primarily with performance of the solution and not tied to a specific design, format or platform.

Background

MaaS, or Mobility as a Service, is a technology platform that allows an individual to query a “mobility operator” which offers modes of transportation and parking services linked via an integrated payment system. The platform takes real-time information from traffic management, transit services and parking programs to respond to user requests for optimal transportation from point “A” to point “B”. (“Optimal” could include such variables and transit time, direct costs and total cost, carbon footprint, calories burned, etc.) The operator provides the user options for getting from A to B using available transit and parking services and accepting payment for the fees associated with that trip. For the user, fees could be subscription based, or the user could have an account funded with a monthly subscription or specified amount that they then can spend for their transportation services. The service allows one point of payment, rather than requiring the user to pay for each leg of their transit service individually.

This type of service shifts the need for car ownership by addressing the “true” need that a user has to get from place to place within a certain amount of time. The City envisions a service which can be provided for a target group of employees initially and then could spread to a larger audience and/or region.

Project Scope and Approach

The service provider will develop language for a formal request for proposals (RFP), which will be used by city staff to solicit bids for development of the “commuter wallet”. This language shall include a scope of work, technical specifications, performance criteria and all other elements of a typical technology solution procurement document.

Task 1: RFP Development: Data Collection for Mobility Services

The service provider will collect information from City staff and key stakeholders on the modes of parking and transit which should be included within a commuter wallet solution. The City envisions that
the wallet would initially focus on a narrow group of users and Palo Alto-focused services, as shown in the diagram below, but that over time, additional services could be integrated.

**Figure 1: Phase Diagram/User Groups for Commuter Wallet**

This diagram shows a conceptual implementation of the wallet, starting in Palo Alto with specific Palo-Alto services for City of Palo Alto employees, and adding incremental services and more user groups over time.

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<th>Key</th>
<th>Phase 1</th>
<th>Phase 2</th>
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<td>Regional Employees and Residents</td>
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| Palo Alto-specific Services | | | | | |
| Lyft, Uber | | | | | |
| VTA/SamTrans | | | | | |
| Bart/Caltrain | | | | | |
| All of the Above | | | | | |

**Phase 1**

- Purchase of on and off-street parking permits for Downtown and California Avenue parking lots and garages; this will require integration with the City’s existing parking permit sales protocols
- Reserving a Bay Area bike share/bike parking services
- Integration with Go Pass/Caltrain and Clipper Card
- Driving a Zipcar (currently Zipcars are the only carshare service accessible in Downtown; if there are other carshare services that could also offer seamless integration, the service provider is encouraged to identify and include them)
- Personal Automobile
- Scoop Rideshare
- Palo Alto Shuttle

**Phase 2**: All of Phase 1, and, Lyft, Uber or other TNC’s (Transportation Network Companies)

**Phase 3**: All of Phase 2, and integration of VTA and SamTrans
Phase 4: All of Phase 3, and integration of Bart/Caltrain

Phase 5: All services for all regional residents.

The commuter wallet should also be set up to incentivize travel decisions and dis-incentivize SOV trips by providing commuters discounts or other perks to use at local business in return taking sustainable transit modes.

In addition to integrating the mobility services, the commuter wallet should also include:

- Integration of real-time traffic data from the City of Palo Alto ATMS (Advanced Traffic Management System), so that the user can be incentivized for using routes which are less congested, and potentially other regional traffic management systems;
- Integration of real-time parking data (in Palo Alto), from the VIMOC IoT landscape computing service and any other parking controls interface, so the driving user can find parking spaces easily;
- Any other innovations that the service provider deems necessary or desirable.

The service provider should ensure that research includes collaboration with other regional MaaS efforts to ensure that concepts and research are coordinated, including but not limited to the Joint Venture Silicon Valley MaaS initiative and RideScout. The scope should be developed to allow customization of services and incentives for specific user groups—e.g. residents of a specific area, employees of certain businesses, etc.—as well as for types of travel or parking choices. The solution should be scalable for other user groups outside of Downtown, adaptable for use in other local jurisdictions and should serve as a local model for a “Regional” MaaS concept.

Task 2: RFP Development: Summary Recommendations

Based on the research and analysis performed in the data collection phase, the service provider will propose a comprehensive list of the proposed modes and data platforms to be integrated into the commuter wallet, and include a detailed description of what work would be required to integrate each component of the commuter wallet into one payment solution. The service provider should develop a list of specifications for this work and identify any potential roadblocks (e.g. Caltrain Go Pass data not available in an open source platform, etc.). The service provider should also include a description of potential uses for the commuter wallet based on existing City initiatives, e.g. city employees or TMA-associated companies, and collect information from Downtown retailers and businesses on potential commuter incentives which could be integrated into the wallet (e.g. free coffee from a local retailer). The service provider should also include information gathered from other cities about the adoptability of the concept and any potential concerns or roadblocks for a Palo Alto or regional implementation.

The service provider should include in the summary report an estimated budget for the services requested in the RFP document and a list of potential qualified bidders.

Deliverable: A comprehensive report which outlines the modes to be integrated into the commuter wallet, their main characteristics and data integration-readiness, and a high-level framework for implementing the commuter wallet in some Palo Alto specific-contexts.