

Metropolitan Transportation Commission
Regional Network Management Committee

April 12, 2024

Agenda Item 3d

Customer Account Management Platform Contract Actions:

- i. Purchase Order: Technical Salesforce Integration and Administration Services: Slalom, LLC (\$1,865,000)**
- ii. Purchase Order Amendment: Technical Salesforce Integration and Administration Services: Slalom, LLC (Federalized) (\$500,000)**

Subject:

A request for Committee approval for i.) a Purchase Order (PO) with Slalom, LLC (Slalom) in the amount of \$1,865,000 for Technical Salesforce Integration and Administration Services; ii.) and a PO Amendment with Slalom in the amount of \$500,000 for Technical Salesforce Integration and Administration Services (Federalized).

Background:

The MTC Salesforce platform currently provides FasTrak® case escalation management, MTC/ABAG Contacts Center, Regional Transit Connection (RTC) discount card intake and verification system, MTC Help Desk system, and application and customer service systems for Clipper START, Express Lanes START, Richmond San Rafael Bridge e-Bike Rebate Pilot, and the Bay Area Toll Payment Plan Program. Slalom has provided development and support for MTC's previous POs related to the Salesforce platform.

Contract Actions:

Staff recommends that the Regional Network Management Committee authorize the Executive Director or his designated representative to issue the following PO (i) and PO amendment (ii):

- i. Technical Salesforce Integration and Administration Services: Slalom, LLC (\$1,865,000)**

Under the proposed PO, and based on their proven experience under prior agreements, Slalom would continue to operate and maintain and further extend the Salesforce platform to support both regional mobility means-based initiatives and internal MTC business operations. The following projects are expected to be completed in fiscal year 2024-25 for the indicated anticipated costs:

- A. Enhancement of the MTC Help Desk system (\$150,000)
- B. Operations and maintenance of Salesforce platform and existing programs (\$1,365,000)
- C. Continued development of a unified benefits online portal (\$250,000)
- D. Support for Clipper 2.0 integrations for Clipper START and RTC (\$100,000)

ii. Technical Salesforce Integration and Administration Services: Slalom, LLC (Federalized) (\$500,000)

Under this PO amendment, Slalom would continue to provide design and development of a Regional Transit Connection (RTC) Self-Service online portal.

Slalom's services are procured using the California Multiple Award Schedule (CMAS), a collaborative intergovernmental procurement vehicle, which satisfies MTC's competitive procurement requirements. Slalom is an authorized vendor under CMAS. Slalom is neither a small business nor a disadvantaged business enterprise and currently has no subcontractors.

Issues:

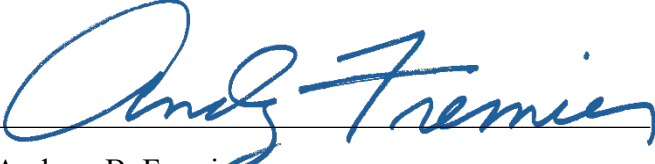
None identified.

Recommendations:

Staff recommends that the Regional Network Management Committee authorize the Executive Director or designee to issue: i) a PO to Slalom, LLC in an amount not to exceed \$1,865,000 to provide technical Salesforce integration and administration services as described herein, and ii) a PO amendment to Slalom in an amount not to exceed \$500,000 to provide technical Salesforce integration and administration services for RTC self-service as described herein.

Attachments:

- Attachment A: Request for Committee Approval – Summary of Proposed Purchase Order
- Attachment B: Request for Committee Approval – Summary of Proposed Purchase Order Amendment


Andrew B. Fremier

Attachment A: Request for Committee Approval

Summary of Proposed Purchase Order

Work Item No.:	1161, 1251, 1311, 2783, 2784, 6854
Consultant:	Slalom, LLC Seattle, WA
Work Project Title:	Technical Salesforce Integration and Administration Services
Purpose of Project:	To provide technical integration and administration services for Salesforce platform development.
Brief Scope of Work:	Provide technical integration and professional services to design, develop, enhance, and maintain the Salesforce platform for regional and internal customer account management program needs.
Project Cost Not to Exceed:	\$1,865,000
Funding Source:	General Funds, BATA, BAIFA, LCTOP, CLTO, STA
Fiscal Impact:	\$1,865,000 is subject to approval in the FY 2024-25 MTC budget, as follows: <ul style="list-style-type: none">• Agency CRM O&M: \$625,000 – General Funds• Bay Area Toll Payment Plan O&M: \$200,000 – BATA• FasTrak Case Management O&M: \$25,000 – BATA• Clipper START O&M: \$200,000 – LCTOP• RTC O&M: \$100,000 - CLTO• RSR Bridge e-Bike Rebate O&M: \$50,000 – BATA• Express Lanes START O&M: \$165,000 (\$40,000 budget approved and \$125,000 subject to approval of the FY24/25 BAIFA budget and extension of the Express Lanes START pilot) - BAIFA• Unified Benefits Portal Expansion: \$250,000 – General Funds• MTC Help Desk Expansion: \$150,000 – General Funds• Clipper 2.0 Launch Support for Clipper START: \$50,000 – LCTOP

- Clipper 2.0 Launch Support for RTC: \$50,000 - STA

Motion by Committee:

That the Executive Director or designee is authorized to issue a purchase order to Slalom, LLC for technical Salesforce integration and administration services described above and in the Regional Network Management Committee Summary Sheet dated April 12, 2024, and that the Chief Financial Officer is authorized to set aside \$1,865,000 for such purchase order, subject to necessary budgetary approvals.

Regional Network Management
Committee:

David Rabbitt, Chair

Approved:

April 12, 2024

Attachment B: Request for Committee Approval

Summary of Proposed Purchase Order Amendment

Work Item No.: 2784

Consultant: Slalom, LLC
Seattle, WA

Work Project Title: Technical Salesforce Integration and Administration Services (Federalized)

Purpose of Project: To provide technical integration and administration services for Salesforce platform development for Regional Transit Connection (RTC) Self-Service online portal.

Brief Scope of Work: Provide technical integration and professional services to design and develop the RTC Self-Service online portal.

Project Cost Not to Exceed: \$500,000

Funding Source: Federal Quick Strike Funds - STBG

Fiscal Impact: \$500,000 is subject to approval in the FY 2024-25 MTC budget for the RTC Self-Service portal.

Motion by Committee: That the Executive Director or designee is authorized to issue a purchase order amendment to Slalom, LLC for technical Salesforce integration and administration services described above and in the Regional Network Management Committee Summary Sheet dated April 12, 2024, and that the Chief Financial Officer is authorized to set aside \$500,000 for such purchase order amendment, subject to necessary budgetary approvals.

Regional Network
Management Committee:

David Rabbitt, Chair

Approved: April 12, 2024