



# City of Santa Fe, New Mexico



## SOLE SOURCE REQUEST AND DETERMINATION FORM

This sole source request form **must** be submitted to the City of Santa, Purchasing Division for authorization, determination and processing by the Chief Procurement Officer (CPO).

*Please ensure to complete this form in its entirety - (\*) must be completed.*

\*Date: 05/16/22

\*Prepared By: Thomas Martinez

\*Title: Transit Division Director

\*Vendor Name: Routematch Software, LLC.

\*Address: 1515 3<sup>RD</sup> STREET

\*City: San Francisco

\*State: California

\*Zip Code: 94158

\*Description of Goods/Service to be procured:

\*Estimated Cost: 231,976.76

Term of Contract: One (1) to Four (4) year from award 4 year

### \*Sole Source Request Justification Questions 1-3.

1. Explain the purpose/need of purchase. Ensure to include a thorough scope of work for the services, construction or items of tangible personal property (if this is an amendment request to an existing contract, attach current contract).

On November 1<sup>st</sup> 2004, The City of Santa (“**Santa Fe Trails**”) conducted an extensive Intelligent Transportation Systems (“**ITS**”) needs analysis and concluded it was a necessity for the agency to procure demand response transportation management scheduling / dispatching software, and support and maintenance services for that software. Santa Fe Trails conducted a competitive procurement which included researching numerous firms, receiving product demonstrations, conducting on-site tours of active systems, and receiving price comparisons and formal solicitation responses. Routematch Software, Inc. (“**Routematch**”) was selected as the most competitive responsive vendor. Routematch was awarded a contract that provided the City of Santa Fe with:

(1) Routematch Demand Software (“**Software**”); (2) tablet computers; (3) professional services to implement the foregoing; and (4) support and maintenance services for the Software. Routematch has provided Software support and maintenance since the inception of this contract.

After Santa Fe Trail’s adoption of the Routematch Software paratransit ITS, we conducted an operational analysis of our fixed route system and evaluation of our overall system. On April 1<sup>st</sup>, 2012, The City of Santa Fe then determined that the integration of the Routematch Software with our fixed route system would provide even greater operational and staff efficiencies, real-time fleet awareness, and overall enhanced customer service.



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2. Provide a detailed explanation of the criteria developed and specified by the department as necessary to perform and/or fulfill the contract.

X

The contractor has affirmed sole source for the services, construction or items of tangible personal property (*Attach memo from vendor*). Provide documentation of due diligence for other possible vendors/contractors to provide the requested services/goods proved unsuccessful; or

Other: explanation of the reasons, qualifications, proprietary rights or unique capabilities (*unique and how this uniqueness is substantially related to the intended purpose of the contract*) of the prospective contractor that makes the prospective contractor *the one source* capable of providing the required professional service, service, construction or item(s) of tangible personal property. (Please do not state the source is the “best” source or the “least costly” source. Those factors do not justify a “sole source.”) *Unique and how this uniqueness is substantially related to the intended purpose of the contract.*

Routematch has proven to be one of fewer than five vendors capable of providing public transportation software that serves the demand response and fixed route technology needs of The City of Santa Fe. Over a number of years, Routematch has added additional products and functionality to its service offerings and we see the value that lies in many of these service offerings. Additionally, Routematch’s customer support team, which has been providing software support and maintenance since the date that we originally purchased the Software, is uniquely positioned to provide unparalleled support and maintenance for our program.

3. Explain why other similar professional services, services, construction or item(s) of tangible personal property *cannot* meet the intended purpose of the contract.

Routematch’s source code is confidential, proprietary intellectual property that it protects to the greatest extent possible, Routematch requires that its customers protect its intellectual property as confidential to the greatest extent the law allows and enters non-disclosure and/or confidentiality agreements whenever the possibility arises that Routematch may need or want to disclose such intellectual property to third parties.

For all these reasons in the aforementioned, The City of Santa Fe believes that a sole source procurement of continuing to have Routematch as its ITS Software and technology provider is necessary. The city is justifiably unable to obtain a product similar to our current designed program, or similar support and maintenance related thereto, which provide the same efficiencies and benefits from any other vendor.




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**\*Approvals:**

Based on the above facts, the City of Santa Fe Purchasing Officer has made the determination that the justification for a Sole Source procurement is in accordance with the State Procurement Code, Section 13-1-126 Sole source procurement., NMSA 1978 and shall be posted for a 30-day period prior to award.

 <small>Fran Dunaway (May 31, 2022 11:16 MDT)</small>	May 31, 2022
_____ Fran Dunaway, CPO Purchasing Officer for the City of Santa Fe	Date

**Pursuant to the State Procurement Code, Section 13-1-126 Sole source procurement., NMSA 1978, the 30-day posting period of the Notice of Intent to Award this Sole Source request was met and no obligation to the award to the above referenced contractor were received. *This Sole Source determination will be valid for a period of one (1) year from the date of the award.***

_____ Fran Dunaway, CPO Purchasing Officer for the City of Santa Fe	Date
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**\*Required Attachments:**

- \*Letter from Contractor acknowledging they are the only source (on their business letterhead and signed by the head of business or financial operations),*
- \*Quote from sole source Contractor*
- \*Agenda Item to be presented to City Council if over \$60,000 for Professional Services and \$60,000 for Goods and Non-Professional Services*

# City of Santa Fe (Santa Fe Trails)

## Sole Source Justification for Annual Software Maintenance and Support

**Date: January 24<sup>th</sup>, 2022**

### **Sole Source Justification Letter:**

On November 1<sup>st</sup> 2004, The City of Santa Fe (“**Santa Fe Trails**”) conducted an extensive Intelligent Transportation Systems (“**ITS**”) needs analysis and concluded it was a necessity for the agency to procure demand response transportation management scheduling / dispatching software, and support and maintenance services for that software. Santa Fe Trails conducted a competitive procurement which included researching numerous firms, receiving product demonstrations, conducting on-site tours of active systems, and receiving price comparisons and formal solicitation responses. Routematch Software, Inc. (“**Routematch**”) was selected as the most competitive responsive vendor. Routematch was awarded a contract that provided the City of Santa Fe with:

- (1) Routematch Demand Software (“**Software**”); (2) tablet computers; (3) professional services to implement the foregoing; and (4) support and maintenance services for the Software. Routematch has provided Software support and maintenance since the inception of this contract.

After Santa Fe Trail’s adoption of the Routematch Software paratransit ITS, we conducted an operational analysis of our fixed route system and evaluation of our overall system. On April 1<sup>st</sup>, 2012, The City of Santa Fe then determined that the integration of the Routematch Software with our fixed route system would provide even greater operational and staff efficiencies, real-time fleet awareness, and overall enhanced customer service.

To achieve the desired operational efficiencies and our integrated ITS vision, Santa Fe Trails has confirmed that Routematch meets its requirements for providing an integrated solution utilizing a single database for paratransit and fixed route services. Routematch has further demonstrated that they have the city’s continued success in their best interest. Routematch understands our vision to enhance its system in the future. Continuing to use Routematch’s ITS System and support and maintenance services is crucial in ensuring we are able to continue providing the highest level of service that our riders have come to expect. Therefore, The City of Santa Fe plans to sole source the Software’s annual maintenance and support agreement.

The Federal Transit Administration’s 2016 Best Practices Procurement and Lessons Learned Manual, provides that the keeping Routematch’s ITS solution and scheduling software is in The City Santa Fe’s best interest for several, essential reasons, including: (1) Unique service – Routematch has proven to be a reliable partner for Santa Fe since the inception of the contract in 2004. Future upgrades and enhancements the city is looking to implement already integrate with the Routematch Software, unlike other providers in the market that are not capable of integrating with the ITS; (2) Substantial Duplication – The City of Santa Fe will enjoy cost savings by adding new products / enhancements to a product which needs no additional development to integrate with the existing Routematch Software; and (3) Unacceptable Delay in Deployment – Santa Fe Trails should avoid any such delays due to Routematch’s familiarity with the Product and the knowledge on how to support and maintain the product and the proven success of

supporting this product at other sites. The following serves as justification for this sole source procurement.

### **Special Conditions – Agency**

Santa Fe Trails requires Routematch support and maintenance of its integrated ITS Software without any long-term interruptions that come with a formal procurement. Our current design/modules in place increases the efficiency of our operations and keeps costs of technical support & maintenance from multiple, disjointed vendors to a minimum. Santa Fe Trails confirms that Routematch continues to meet its required features consisting of the following (the “**Required Features**”):

- Demand/Paratransit and Fixed Route CAD/AVL.
- GIS Mapping Data.
- Technical Support and Maintenance.
- Minimize service disruptions and time spent drafting, evaluating and transitioning through a formal procurement process.
- Minimize implementation costs of transitioning to a new system.
- Scalability to add future functionalities that we may look to integrate into our existing system.

### **Unique**

Routematch has a proven record of working collaboratively, and has further proven to integrate well with other disciplines in the industry. Delays and service interruptions caused by a competitive process and the possible transition of software vendors, would disadvantage our city and the public, who depend on its services to be delivered as efficiently and inexpensively as possible.

### **Substantial Duplication**

Santa Fe Trails has successfully used Routematch's proprietary ITS Software for eighteen years depending on Routematch for continual support and maintenance of the Software. Routematch developed the Software in-house, and Routematch alone knows how to deploy, support, and maintain the Software (particularly in light of the fact that Routematch actively protects the Software as a confidential and proprietary trade secret).

### **Vendor's Unique Qualifications**

Routematch has proven to be one of fewer than five vendors capable of providing public transportation software that serves the demand response and fixed route technology needs of The City of Santa Fe. Over a number of years, Routematch has added additional products and functionality to its service offerings and we see the value that lies in many of these service offerings. Additionally, Routematch's customer support team, which has been providing software support and maintenance since the date that we originally purchased the Software, is uniquely positioned to provide unparalleled support and maintenance for our program.

### **Special Conditions - Vendor**

Routematch's source code is confidential, proprietary intellectual property that it protects to the greatest extent possible, Routematch requires that its customers protect its intellectual property as confidential to the greatest extent the law allows and enters non-disclosure and/or confidentiality agreements whenever the possibility arises that Routematch may need or want to disclose such intellectual property to third parties.

For all these reasons in the aforementioned, The City of Santa Fe believes that a sole source procurement of continuing to have Routematch as its ITS Software and technology provider is necessary. The city is justifiably unable to obtain a product similar to our current designed program, or similar support and maintenance related thereto, which provide the same efficiencies and benefits from any other vendor.