



*Oklahoma Turnpike Authority
3500 Martin Luther King Ave.
P.O. Box 11357
Oklahoma City, OK 73136-0357*

**Request for Proposal
For A General Technology Consultant Firm
(RFP # 18-003)**

1. INTRODUCTION:

The Oklahoma Turnpike Authority (OTA) is seeking proposals from potential qualified firms that would demonstrate to the OTA that the firm would be “qualified” and competent to provide the services listed in this Request for Proposal (RFP).

To be considered “qualified,” firms must be independent and demonstrate the skills and experience necessary to perform, at a minimum, the services listed in this Request for Proposal (RFP). **General Technology Consultant Services** shall be undertaken in a manner consistent with the prevailing accepted standard for similar services with respect to projects of comparable function and complexity and with the applicable laws and regulations published and in effect at the time of performance of the services.

2. PURPOSE:

The Oklahoma Turnpike Authority is submitting this request for proposal (“RFP”) to solicit sealed proposals from qualified consultants (the “Consultants”) to establish one or more contracts through competitive negotiations for the provision of services as General Technology Consultant (the “GTC”) to the OTA on facility operations.

It is the Oklahoma Turnpike Authority’s intent to select a qualified consultant to provide toll-industry technology expertise and on-call resources for both fixed and variable projects as defined in the attached Scope of Work. The consultant will work with the OTA’s various departments and existing GTC to provide assistance and expertise on, but not limited to, toll system and information technology system; provided however, the GTC will receive final approval from the OTA’s representatives on all projects.

3. CONTRACT PERIOD:

Two (2) year contract with an option to renew for three one year extensions with mutual agreement between the OTA and the GTC selected. All rates provided in the Consultants response shall be valid for the 3 year initial term and open for negotiation for any subsequent contract extensions.

A lane matrix showing all of OTA’s toll collections lanes current and future, including configuration, will be provided via electronic mail upon request from the Offerors (see

Offeror Understanding of Requirements for procedures on requesting information). Such lane matrix is subject to change and accurate verification by the Offerors. Any other available information will be made available upon request.

4. SCOPE OF SERVICES REQUESTED:

See the attached Scope of Work.

5. INSTRUCTIONS AND CONDITIONS FOR SUBMITTING PROPOSALS:

In connection with this RFP, interested firms should limit their contact with the OTA by communicating with **David Machamer** at (405) 425-3656 or dmachamer@pikepass.com regarding this RFP.

Contact with persons other than Mr. Machamer regarding this RFP may be grounds for elimination from the selection process.

6. RFP SUBMISSION:

All responses to this RFP must be received by the **Oklahoma Turnpike Authority, Attention: Dwight G. Brown, Procurement Officer, P. O. Box 11357, Oklahoma City, OK 73136-0357 by 3:00 P.M., Central Standard Time, Friday, March 23, 2018.** Responses may be hand delivered to the OTA's Reception Desk at 3500 Martin Luther King, Oklahoma City, OK. 73111 (delivery by telephone facsimile will not be accepted). All proposals should be mailed in an envelope clearly marked "Proposals # 18-003. Proposals will be opened immediately after the closing deadline.

7. RESPONSIVENESS:

The detailed requirements set forth below are mandatory. Failure to respond to a specific requirement may result in disqualification. The submission should be concise and limited to no more than **25** pages (8 1/2 x 11" with no appendices). Graphic Illustrations may be on pages up to 11 x 17 in size but cannot include any other information. Written text not associated with the graphic will not be evaluated. All proposals will have a 12 pitch font size minimum. All text sheets in the proposal must be numbered and will be counted towards the page count, excluding appendices information.

- 7.1 Interested firms must submit one electronic copy on thumb drive and one (1) original and six (6) copies of their response (7 total documents).
- 7.2 Requirements listed in the Scope of Work, Title on a separate page "Response to Scope of Work." For each potential task it is requested that the firm list the member(s) of their team that would be assigned to the task.
- 7.3 A resume must be submitted as a part of the response for each team member assigned to a potential task.

8. SCHEDULE OF EVENTS:

The OTA intends to use the following schedule of events for issuance of and response to this Request for Proposal, this schedule is subject to change:

<u>Date of Completion</u>	<u>Description of Event</u>
March 1, 2018	Issue RFP
March 12, 2018 (10:00AM Central Standard Time)	Mandatory Pre-proposal Teleconference Phone Number 1-877-320-7346
March 16, 2018	Deadline to send questions in writing
March 23, 2018 (3:00 p.m.)	Deadline for submission of RFP response
April 3 & 4, 2018	Optional Interviews
April 24, 2018	OTA selection & award

9. AWARDS AND EVALUATION PROCESS:

1.1 The contents of the proposals of the successful firm shall become contractual obligations if procurement ensues. In the event of any conflict in the terms and/or conditions of this RFP and any subsequent contract resulting from this RFP, then the terms and conditions of this RFP shall take precedence. Failure to accept these obligations in a contractual agreement would result in cancellation of the award.

1.2 Evaluation Criteria:

All proposals will be reviewed by a designated committee with staff assistance as needed. Firms may be asked to give formal presentations to those committees. Their findings may be submitted to the OTA for consideration and/or award.

- 1.2.1 Cost
- 1.2.2 Knowledge of toll facility operations and technology
- 1.2.3 Experience of the proposed team
- 1.2.4 Approach to providing services
- 1.2.5 Experience of the proposed project coordinator
- 1.2.6 The review committee will determine the relative importance of each category

10. APPEAL PROCESS:

Any firm that feels it has been unjustly treated may file a written objection within five

business days of date of award to Mr. Alan Freeman, Assistant Executive Director – Finance and Administration. If a firm is not satisfied with the response they may appeal to Mr. Tim Gatz, Executive Director at P.O. Box 11357, Oklahoma City, OK. 73136-0357.

11. STANDARD TERMS AND CONDITIONS:

11.1 Proposal Costs Incurred:

The Oklahoma Turnpike Authority is not liable for any costs, including tolls, incurred by firms responding to the RFP.

11.2 Proprietary Information:

The firms are hereby notified that information submitted will be handled in accordance with applicable laws, regulations, and policies of the OTA.

11.3 Non-Collusion Bidding Certificate:

The attached “Affidavit of Non-Collusion” must be signed and notarized and included with the proposal.

11.4 Insurance and Indemnification Requirements:

11.4.1 The firm shall protect, indemnify, save and hold harmless the OTA, its officers, agents, and employees from all suits, actions, or claims of any kind or character brought because of injuries or damages received or sustained by any person, persons, or property on account of any operation of the firm, its agents, employees, sub-contractors or any others authorized by the firm to perform work as specified under any contract for services which may result from responding to this solicitation.

11.4.2 The firm shall at its own expense procure coverage provided hereunder from companies authorized to do business in the State of Oklahoma prior to executing a contract for services. Before commencing any work hereunder, the firm shall furnish to the OTA certificates of insurance as required herein showing that it has complied with this section.

11.4.3 In the event any of the work performed by the firm is sublet or assigned, or is otherwise to be performed by anyone other than the firm’s own employees, then the insurance specified in this section shall extend to cover such work.

11.4.4 All policies required under this solicitation and any ensuing contract shall be maintained in force until completion of the work and shall include an endorsement requiring thirty (30) day prior written notice to the Authority before any change or cancellation is made effective. The AUTHORITY shall be named as an additional insured on the policies described.

11.4.5 Types and minimum limits of insurance required:

11.4.6 Comprehensive General Liability Insurance shall be carried for a combined

amount of not less than one million (\$1,000,000) for bodily injury for each occurrence, including those resulting in death, and with an aggregate limit of \$2,000,000, together with \$500,000 in property damage coverage for any one occurrence;

11.4.7 Worker's Compensation and Employer's Liability Insurance shall be carried to cover the Offerer's liability under the Worker's Compensation Law of the State of Oklahoma when applicable having a liability limit of not less than \$100,000.

11.4.8 Comprehensive Automobile Insurance coverage which applies to owned, non-owned, and hired automobiles having a limit of not less than \$1,000,000 for bodily injury, including death, to any one person, and \$2,000,000 aggregate, together with \$100,000 for property damage on account of each occurrence.

12. PUBLIC AVAILABILITY TO RFP RECORDS:

Copies of the proposals will be available for public inspection, (after award has been made) under supervision of the Purchasing Department, in the General Administration Division from 7:30 A.M. to 4:30 P.M. Monday through Friday at the Oklahoma Turnpike Authority, 3500 Martin Luther King Avenue, Oklahoma City, OK 73111.

13. DEVIATIONS AND EXCEPTIONS:

Deviations and exceptions from the terms, conditions, or specifications shall be described fully on the firm's letterhead. In the absence of such statement, the proposals shall be accepted as in strict compliance with all terms, conditions, and specifications.

14. AUDIT OF RECORDS:

In the event a contractual agreement is created pursuant to this RFP, the contract must contain the following audit clause.

[Firm] shall permit OTA designated personnel the right to examine [firm's] relevant financial and operational records related to this agreement. OTA shall have the right to audit and verify statements submitted by [firm] pursuant to this agreement. [Firm] shall retain these records for a period of three years after the final payment under this agreement or until all pending matters are closed, whichever is later. OTA reserves the right to dispute and receive credit for any costs which an audit may prove to be inappropriate.

15. OTHER TERMS AND CONDITIONS

The Authority reserves the right to reject any or all proposals or to cancel this solicitation at any time.

The Authority reserves the right to waive minor technicalities in this RFP.

16. TERMINATION OF CONTRACT OR TASK ORDER:

16.1 This contract can be cancelled by either party with a 30 day written notice to the other party (the written notice must be by certified mail with a return receipt requested); or the OTA may immediately cancel this contract when violations are found to be an impediment to the function of the OTA and detrimental to its cause, or when conditions preclude the 30 day notice.

16.2 This contract may be reduced, canceled, and/or not renewed, should the OTA believe it is in the best interest of the OTA.

16.3 An executed task order can be cancelled by the OTA at any time with or without cause after written notice is given.

16.4 If this contract or a task order is terminated, the OTA shall be liable only for payment of services already rendered before the effective date of termination.

17. MANDATORY PRE-BID TELECONFERENCE:

17.1 The **mandatory** pre-bid teleconference will be held at 10:00 AM, Central Standard Time, Monday, March 12, 2018. **The teleconference number is 1-877-320-7346.** The teleconference will be held at the OTA headquarters office located at 3500 N. Martin Luther King Avenue, Oklahoma City, Oklahoma 73111.

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GENERAL TECHNOLOGY CONSULTANT SERVICES SOLICITATION REQUIREMENTS & GENERAL SCOPE OF WORK

Please show the team member(s) that would be assigned to each potential task order below. Enclose with the response each members resume'.

Scope of Work:

The OTA seeks General Technology Consultant services provided by the Contractor that shall include, but are not limited to, any or all of the following:

I. Toll Collection System and Operations

- A. Review, observe, and inspect the electronic toll collection system reader transition from single-mode to tri-mode operations (TDM, Sego, 6c);
- B. Develop and oversee RFP process for the ETC Lane Maintenance Services and Lane Integrator;
- C. Provide advisory and project management services for converting certain Turnpikes to All Electronic Tolling (AET); including legislative changes
- D. Provide inspection services for the installation of new tolling equipment, specifically TransCore lane equipment (VCARS, IVIS, Infinity, and E6 Readers);
- E. Provide technical advisory services for evaluating new technology: new RFID protocols to the OTA System, New LPR camera equipment, etc.;
- F. Provide advisory, management, and technical services for compliance with National Interoperability (Maps 21);
- G. Review and recommend operational changes to provide efficient services;
- H. Provide on-call staff and resources for toll system projects as needed;
- I. Create template for use in project evaluation including criteria to measure success;
- J. Review and recommend Toll uses for GIS program;
- K. Review and recommend Toll signage at plaza for customer safety, confusion reduction, and consistency;
- L. Review and recommend strategic plan for connected and autonomous vehicles;
- M. Review and update Toll Emergency Plan for business resumption in the event of a disaster;
- N. Provide advisory and project management services over programs to increase PIKEPASS penetration at target locations;
- O. Review and recommend technical or process changes required to reduce or eliminate equipment down time in AET lanes associated with in lane equipment;
- P. Review and recommend program changes to attract and retain quality employees;
- Q. Review violation business rules and recommend process and legislative changes. Advise OTA on National Interoperability as needed.
- R. AET Financial Analysis, waterfall reports, process improvement recommendations, and reconciliation, etc..

II. PIKEPASS Customer Service Center

- A. Provide advisory and management services in developing effective methods including KPIs for evaluating operational and individual efficiencies,
- B. Review current Business Rules and legislation and make recommendations for improvement and/or needed legislation to improve AET affectively;
- C. Review Business Rules and Practices in account management and recommend areas for improvement in financial efficiencies in the operations,
- D. Recommend affective ways to increase PIKEPASS penetration that fit OTA's environment as well as specific to a turnpike,
- E. Provide advisory and management services for implementing AET customer service operations.
- F. Review PIKEPASS Customer Service Operations and provide recommendations to improve efficiencies.
- G. Recommendations for staffing (total FTE's) and utilization; current and strategic planning.
- H. Recommendations for additional management staffing; re-purposing current staff and defining new positions.

III. Information Technology (IT) System and Operations

- A. Assist in replacement of Hanson, OTA's Maintenance, Asset, and Facility Management Application. This would include finding a new replacement solution.
- B. Electronic Progressive Payment System – software development- maintaining existing (SharePoint/C#) system as well as providing future enhancements.

IV. On-site Project Coordinator

Services will be requested by OTA via Task Orders wherein OTA states the services to be performed and the Contractor provides timelines and costs to complete the Task Order. On site project coordinator will not be required unless the particular Task Order requires Contractor on-site presence.

The Contractor will provide a statement of work before authorization of any tasks. Further, OTA may request the Contractor to provide services beyond those itemized above but within the scope of the contract. Compensation for such additional services shall be in accordance with the rates and terms of the Contractor's proposal and subsequent amendments that will constitute the contract between the OTA and the Contractor. An authorized representative of the OTA will initiate all General Technology Consultant services and shall approve each engagement before work is to begin.

Additional Proposal Preparation and Submission Instructions:

Proprietary Information:

If the OTA engages the Contractor to develop software on a work for hire basis, the OTA will retain sole ownership of such software.

Oral Presentation:

Offerors who submit proposals in response to this RFP may be required to give an oral presentation of their proposal to the Proposal Evaluation Team. An oral presentation may provide an opportunity for the Offeror to clarify or elaborate on the proposal. If held, OTA will schedule the time and location of these presentations. Oral presentations are an option of the Proposal Evaluation Team and may, or may not, be conducted.

Offeror Understanding of Requirements:

Offerors are responsible to inquire about and clarify any requirement of this RFP that is not understood. Your submittal constitutes the Contractors understanding of the RFP and OTA Operations. No oral requests for information will be accepted. All inquiries related to this RFP must be submitted no later than March 16, 2018 to David Machamer at dmachamer@pikepass.com. Please reference the RFP # 18-003 in the title of the correspondence. No further written inquiries will be accepted after close of business on that day.

Specific Proposal Requirements:

In addition to the tabbed items below, each proposal shall include, a letter of transmittal from the prime Offeror demonstrating the Offeror's as well as all proposed subcontractor's commitments to the project for specific time periods, and identifying their relationships and arrangements with the Offeror.

Proposals should be as thorough and detailed as possible so that OTA may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items, separated by tabs within the proposal.

Tab 1: General Qualifications:

- a. Describe your firm's organizational structure and history. Include legal name and address; legal form of company (partnership, corporation, joint venture, etc.); if joint venture, identify the members of the joint venture and provide all information required within this section for each member; or if company is wholly-owned subsidiary of "parent company"; and address(es) of office(s) working on this engagement.
- b. Describe your firm's business relationship with TransCore.
- c. Describe your firm's business relationship with tolling equipment manufacturers and tolling services providers.

- d. Describe your firm's toll industry expertise and your firm's qualifications to provide General Technology Consultant services in a toll facility environment.
- e. Describe your firm's experience in the inspection, review and assessment of toll facilities and related operation policies and procedures.
- f. Describe your firm's experience in developing testing standards and specifications for toll equipment and software, including electronic toll collection.
- g. Describe your firm's experience in the inspection, review and assessment of violation enforcement system equipment, tolling equipment and processes.
- h. Describe your firm's experience in the inspection, review and assessment of toll facility-specific information technology environments and related operational policies and procedures.
- i. Describe your firm's experience in the design, development and implementation of information technology related server and storage environments.
- j. Describe your firm's experience in the design, development and implementation of information technology related network and security environments.
- k. Describe your firm's experience in the design, development and implementation of information technology related telecommunication environments.
- l. Describe your firm's experience in the design, development and implementation of transportation Maintenance Division technology related solutions.
- m. Describe your firm's experience in providing similar General Technology Consulting services within the toll industry.
- n. Provide a list of all firms you have done similar work for. The list must include dates you performed the work, type of work performed, contact personnel, phone number, and addresses. Also provide a similar list(s) for each subcontractor you propose to use.

Tab 2: Proposed Staff Qualifications & Resources

- a. Provide the name and resume of the proposed onsite Project Coordinator. The contractor's proposed person may be replaced at the request of the OTA prior to award. Once this person is assigned, he/she will only be taken off this engagement with the OTA's approval. Describe your proposed Project Coordinator's experience in providing similar General Technology Consulting services within the toll industry.

- b. Provide the name and resume of the prime provider's company representative assigned to this project, if different from the Project Coordinator. The contractor's proposed person may be replaced at the request of the OTA prior to award. Once this person is assigned, he/she will only be taken off this engagement with the OTA's approval. Describe your proposed representative's experience in providing similar General Technology Consulting services within the toll industry.
- c. Provide a detailed organizational chart which graphically illustrates the structure of your team and each of the required elements to provide OTA with a successful General Technology Consultant contract.
- d. Identify by name, title and location, the key individuals who will be responsible for this relationship. Describe the role of each individual; provide summary resumes (no more than one page) for all individuals listed. Indicate the roles and responsibilities of any sub-consultants and indicate each sub-consultant's involvement as a percentage of the overall team effort.
- e. Provide an estimate of your firm's current workload and available resources. The firm should specifically address this issue with respect to the proposed key personnel for this engagement. Also, disclose involvement in any pending OTA projects.
- f. Demonstrate your firm's ability to provide additional resources and to react to changes in scope and service.

Tab 3: Project Understanding & Plans for Providing Services:

- A. Briefly describe your firm's understanding of OTA's needs for a General Technology Consultant.
- B. Describe your approach to providing General Technology Consultant consulting services and how you propose to meet the needs described herein. Discuss the technical and management approach to this engagement, including staffing plans. Discuss communication methods necessary to ensure deliverables and projects are completed on schedule.

Tab 4: Pricing Schedule:

- A. A list of relevant disciplines needed for this engagement has been attached to this RFP (Attachment A). Provide a pricing schedule for each discipline listed in Attachment A. Provide detail concerning additional, estimated fixed and variable expenses. Offeror may add any relevant disciplines not listed in the Attachment A.
- B. Provide the cost for the Project Coordinator to be onsite for one year (1,800 hours).

Tab 5: Appendices, Data and Other Submissions:

Include signed copies of any addendum (if applicable), data or other submissions necessary to support your proposal.

ATTACHMENT A:

Group	Title	Years Direct Experience	Skills
Toll	Task Manager	10 - 15	<p>Wide ranging experience in toll industry</p> <p>Knowledgeable of:</p> <p>Toll Plaza Design</p> <p>Toll Operations</p> <p>Toll Systems</p> <p>Operations and Maintenance Costs and Procedures</p> <p>Audit/ Accounting</p> <p>Latest Toll Technology.</p> <p>Excellent communication skills</p>
Toll	Software Specialist	5 - 10	<p>Trained as a software developer</p> <p>Previous experience in toll collection system software or similar</p> <p>Knowledgeable of:</p> <p>Lane software</p> <p>Plaza software</p> <p>Host software</p> <p>Customer Service Center and Violation Processing software</p> <p>Audit/ Accounting software</p> <p>Toll system testing and troubleshooting</p>
Toll	Hardware Specialist	5 - 10	<p>Trained or significant experience in hardware selection and technology relating to toll systems</p> <p>Previous experience in toll collection system hardware</p> <p>Knowledgeable of:</p> <p>Lane hardware</p> <p>Plaza hardware</p> <p>Host hardware</p>

			<p>Customer Service Center and Violation Processing hardware</p> <p>Workstations and other peripheral equipment</p> <p>Toll system testing and troubleshooting</p> <p>6C and IAG Protocols</p> <p>Tri-protocol readers</p>
Toll	Audit/Accounting Specialist	5 - 10	<p>Trained or significant experience in accounting and audit principles relating to toll systems or similar</p> <p>Previous experience in toll collection system audit and accounting practices</p> <p>Knowledgeable of:</p> <p>Transaction processing and data</p> <p>Toll collector operations and audit requirements</p> <p>Host hardware</p> <p>Customer Service Center and Violation Processing</p> <p>Toll system testing and troubleshooting</p>
Toll	Toll Operations Specialist	5 - 10	<p>Trained or significant experience in toll facility operations or similar</p> <p>Previous experience in toll facility operations and toll collection</p> <p>Knowledgeable of:</p> <p>Cash collection</p> <p>ETC collection</p> <p>Personnel management</p> <p>Customer Service Center and Violation Processing</p> <p>Facility operations and traffic management</p> <p>Toll system testing and troubleshooting</p>
Toll	Toll Maintenance Specialist	5 - 10	<p>Trained or significant experience in hardware and software maintenance relating to toll systems</p> <p>Previous experience in toll collection system maintenance or similar</p> <p>Knowledgeable of:</p> <p>Lane hardware and software</p> <p>Plaza hardware and software</p> <p>Host hardware and hardware</p>

		<p>Customer Service Center and Violation Processing hardware and software</p> <p>Workstations and other peripheral equipment</p> <p>Toll system testing and troubleshooting</p> <p>Costs associated with toll system maintenance</p>
Toll	Toll Technology Specialist	<p>Trained or significant experience in RFID and tolling equipment</p> <p>Previous experience in collection equipment technology or similar</p> <p>Knowledgeable of:</p> <p>Lane hardware and software</p> <p>Plaza hardware and software</p> <p>Host hardware and software</p> <p>Customer Service Center and Violation Processing hardware and software</p> <p>Workstations and other peripheral equipment</p> <p>Toll system testing and troubleshooting</p> <p>6C and IAG Protocols</p> <p>Tri-protocol readers</p>
Toll	Electronic Tag Customer Service Specialist	<p>Trained or significant experience in area of operations of an electronic toll tag customer service center</p> <p>Previous experience in operations of an electronic tag customer service center</p> <p>Knowledgeable of:</p> <p>Certified or proficient in Six Sigma Methods</p> <p>Developing Key Performance Indicators (KPIs)</p> <p>Change Management</p> <p>Video Enforcement / Pay by Plate Operations</p> <p>Analyzing / Developing efficiencies in operations</p> <p>Call Center efficiencies including Quality Assurance</p>

Group	Title	Years Direct Experience	Skills
IT / Software	Sr. Software Developer	5 to 7	<p>Windows Forms, Windows Services, Web Services</p> <p>Windows XP 7, 8</p> <p>Bachelor's Degree in Computer Science, MIS, or other related field of study</p> <p>5-7 years professional programming experience in application development using Visual Studio 2008, 2010, 2012, and 2013</p> <p>Strong C# and SharePoint development skills</p> <p>Strong knowledge of data mining services, architecture, validation, and testing with an emphasis on developing to large-scale SQL Server implementations</p> <p>Able to deliver quality products in a rapid Agile environment</p> <p>Experience with web service-oriented architectures</p> <p>Experience with TFS and Test Driven Development</p> <p>Experience with OWASP and secure coding and development practices with a full understanding of security during the SDLC</p> <p>Experience working and delivering complex software projects with Scrum</p> <p>5+ year's of experience in medium to large business environment direct support for 100+ users</p>