

Addendum No. 5

December 11, 2017

Back Office System (BOS) Request for Proposals (RFP)

Prospective Respondents: You are hereby notified of the following information in regard to the referenced RFP:

- Section A - Official revisions to the BOS RFP

All other terms, conditions and requirements of the original RFP dated October 10, 2017 remain unchanged unless modified by this addendum, or previous addenda to this RFP.

A. REVISIONS (Deletions are shown in red text strikeout mode and additions are in red text and underlined)

1. Replace the date under 'Qualification Package Due Date' on the cover of the RFP with the following:

Qualification Package Due Date

~~December 21, 2017~~ January 16, 2018 | 4:00 p.m. Local Time

2. **Table I-I BOS RFP Procurement Schedule** within 'Section I – Administrative' is hereby replaced in its entirety as follows:

| SCHEDULE | |
|--|---|
| (The NCTA reserves the right to modify the schedule at any time and for any reason.) | |
| RFP Issue Date | October 10, 2017 |
| Mandatory Pre-Proposal Conference | October 24, 2017 (10:00 a.m. to 12:00 p.m. EDT) |
| RFP Questions and Proposer Industry Comment Due | November 7, 2017 |
| NCTA Question Responses and Addendum (if required) Due | November 27, 2017 |
| Response to RFP (Proposer's Qualification Package) Due Date/Time | December 21, 2017 <u>January 16, 2018</u> (4:00 p.m. EDT EST) |
| Short-list Notification | February 12 <u>22</u> , 2018 |
| Final Contractor Selection | June 21, 2018 <u>July 2, 2018</u> |

| GENERAL INFORMATION | |
|------------------------------------|--|
| Contact Person Contact Information | Kristen Pearce Toll Systems Manager E-Mail: nctabosrfp@ncdot.gov Phone: (919) 674-5544 |
| Response Delivery | NCDOT-North Carolina Turnpike Authority 1578 Mail Service Center Raleigh, NC 27699-1578 |
| Posting Locations | www.ncdot.gov www.tollroadsnews.com |

3. Table 3-I Key Implementation Dates within 'Section III – Scope of Work and Requirements' is hereby replaced in its entirety as follows:

| Milestone | Start Date | End Date |
|---|---|---|
| Receipt of Qualification Packages | | December 21, 2017 January 16, 2018 |
| Qualification Package Scoring and Short-listing | December 22, 2017 January 17, 2018 | February 11, 2018 February 21, 2018 |
| Authority Notifies Short-listed Proposers and Holds Kick-off Meeting | February 12, 2018 February 22, 2018 | February 28, 2018 March 6, 2018 |
| Preliminary System Design Procurement Phase | March 1, 2018 March 7, 2018 | June 20, 2018 June 29, 2018 |
| Final Selection and Contract Negotiations | June 21, 2018 July 2, 2018 | July 31, 2018 |
| Notice to Proceed (Final System Design and Development Phase Commences) | August 1, 2018 | January 31, 2019 |
| System Testing and Installation Phase | February 1, 2019 | May 20, 2019 |
| Training Phase | May 21, 2019 | August 1, 2019 |
| Cutover from Legacy System | July 1, 2019 | July 31, 2019 |
| Back Office Go Live | | August 1, 2019 |
| Maintenance and Project Closeout Phases | August 2019 | October 2024 |

4. Replace the first paragraph under section 'Section 1.2 Qualification Requirements' in Section IV – Qualification Package Response and Submission Instructions of the RFP in its entirety with the following:

Proposers **and / or their Subcontractor(s)** shall demonstrate significant experience in those areas for which they are submitting a Qualification Package. These areas shall include:

5. Replace item number 6 in 'Section 1.3.1 Content of Qualification Package, C. Qualification Package Section I: Proposer Qualifications' in Section IV – Qualification Package Response and Submission Instructions of the RFP in its entirety with the following:

6. The Proposer Company Reference, using **Exhibit D-2, Forms**. The completed forms must include at least two (2) **project** references ~~that to~~ demonstrate ~~that~~ the Proposer **and / or its Subcontractor(s) can meet**s the following minimum requirements:
 - a. The Proposer **and / or its Subcontractor(s)** shall have successfully designed, developed, implemented and be currently maintaining a back office solution for at least one (1) toll agency project (or similar Project type). **The Authority strongly desires that the back office solution is for a toll agency located** in the United States. The back office solution must be able to process financial, account-based transactions (including the production and mailing of toll bills or similar), and it must support account quantities and annual transaction volumes similar to, in excess of, NCTA's current numbers listed in Attachment 1. The Proposer shall have maintained the system for at least one (1) year as of October 2017.
 - b. The ~~proposer~~ **Proposer and / or its Subcontractor(s)** shall have successfully planned for the migration of legacy system data into a new account-based solution, migrated legacy data into a new account-based system, tested the new system and reporting functionality with the newly migrated legacy data incorporated and implanted the new system inclusive of both legacy and new system data.