

Digital Transformation & Modernization

Mandatory Pre-Proposal Scope of Services Meeting

October 16, 2024, 11:00 a.m. – 12:00 p.m.

Online via Web conference



Role call for one person by company

PLEASE MUTE YOUR LINE IF YOU
ARE NOT SPEAKING

Pre-Proposal Meeting Details

- Post questions via chat and they'll be responded to at the end of this presentation
- All verbal comments and responses are non-binding
- Questions shall be made in writing if a formal response is requested
- A copy of this presentation will be posted on the NCTA website at:
<https://connect.ncdot.gov/business/Turnpike/Pages/DigitalRFP.aspx>



Welcome and Introductions

Eliza Davis

Staff Introductions

Procurement Role	Name	Job Title
Point of Contact / Administrative & Compliance Committee Member	Eliza Davis	Project Contracts Administrator
Project Manager / Evaluation Committee Member	Manish Chourey	Chief Technology Officer
Evaluation Committee Member	Cheryl Reed	Chief Financial Officer
Evaluation Committee Member	Ron McCollum	Eastern Deputy Chief Engineer

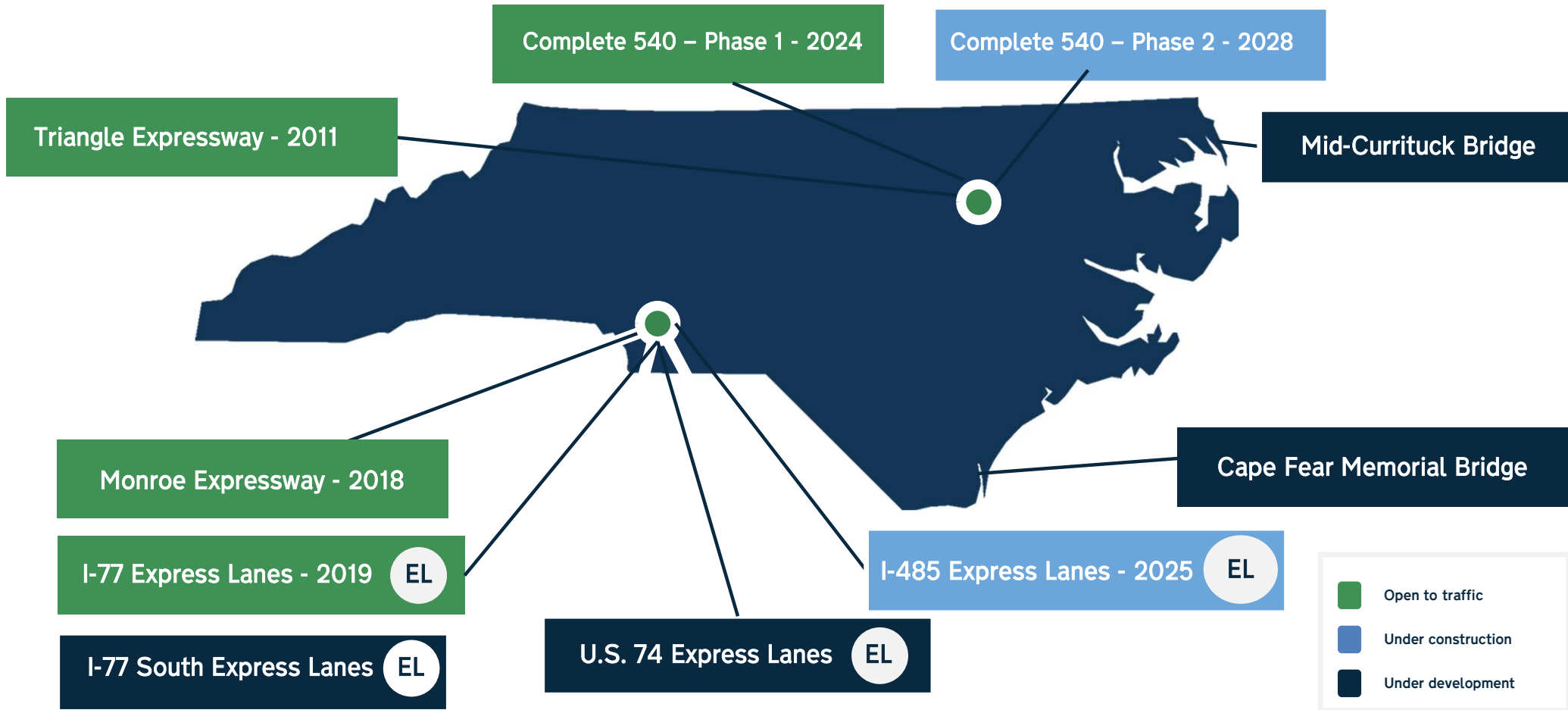
Agenda

- Project Introduction & Goals of Procurement
- Overview of Procurement Process
- Scope of Work and Requirements
- Digital Transformation & Modernization Project Timeline
- Questions and Answers/Closing Remarks

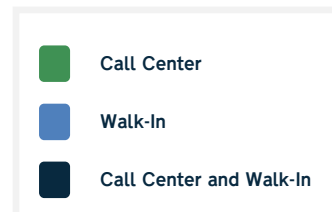
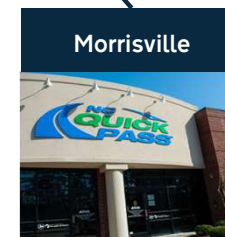
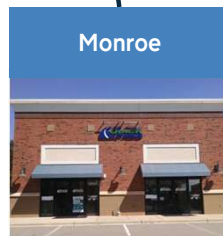
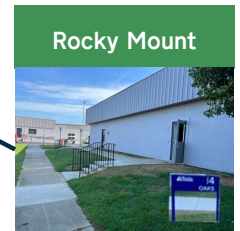
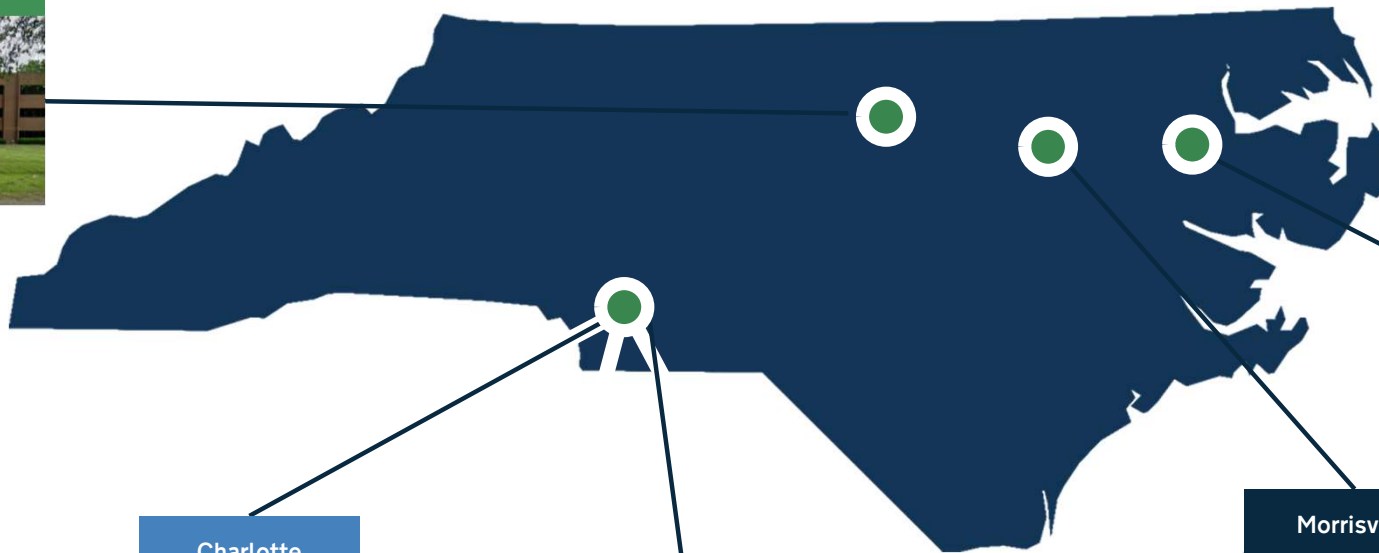
Project Introduction & Goals of Procurement

Manish Chourey

NCTA Toll Facilities



NC Quick Pass Customer Service Centers and Walk-In Centers



Digital Transformation & Modernization RFP Goals

- Maximize interoperability through loose coupling, hosting portability, reuse.
- To follow modern API development principles.
- NCTA ownership of data (System of Record).
- Produce an end-state solution that satisfies the following conditions:
 - Easy to scale both horizontally and vertically.
 - Enable Integration channels to upgrade with minimal operational disruption.
 - Maintain reasonable currency (N-1/N-2) for both hardware and software.
 - Provides real-time, transaction and full stack monitoring and alerting.
 - Guarantees delivery of all transactions, messages, files and data processed
 - Minimizes Total Cost of Ownership (TCO), integration effort, maintenance frequency

Overview of Procurement Process

Eliza Davis

RFP Content

- Part I Administrative
- Part II Defined Terms and Acronyms
- Part III Scope of Work and Requirements
- Part IV Proposal Content
- Part V Terms and Conditions

RFP Materials

- 4 PDF packages found on the NCTA Website for download:
<https://connect.ncdot.gov/business/Turnpike/Pages/DigitalRFP.aspx>
 - RFP
 - Exhibits
 - Attachments
 - Appendices
- Attachments & Appendices both include supporting documentation to the RFP
- Exhibits includes forms that are to be filled out and submitted with proposal submissions
 - See RFP Part IV, Section 1.1.J for the proposal forms and submittal checklist

Procurement Schedule

Category	Date
RFP Issued	October 1, 2024
Mandatory Pre-Proposal Scope of Services Meeting	October 16, 2024 (11:00 a.m. to 12:00 p.m. ET)
Proposer Questions Due	October 24, 2024 (4:00 p.m. ET)
NCTA Response to Questions	Week of November 4, 2024
Technical Proposals Due	November 20, 2024 (4:00 p.m. ET)
Oral Interviews & Presentations	Week of January 21, 2025
Notification of Proposers Shortlisted	January 31, 2025
Price Proposals Due (ONLY Shortlisted Proposers will submit a Price Proposal)	February 7, 2025 (4:00 p.m. ET)
Ranking of Proposers for Negotiations	Week of February 10, 2025
Notice of Award	Week February 17, 2025

NCTA reserves the right to modify the schedule at any time and for any reason.

Proposer Questions

- Due October 24, 2024, by 4:00 p.m. EDT
- All questions and comments to be submitted using Exhibit C-5: Proposer Questions Form
- All questions and comments must be emailed to: [NCTA Digital RFP@ncdot.gov](mailto:NCTA_Digital_RFP@ncdot.gov)
- NCTA will provide responses the Week of November 4, 2024, and publish Addenda, if required

Technical Proposal Submittal and Evaluation

- Due November 20, 2024, by 4:00 p.m. EDT
 - Refer to RFP Part IV, Section 1.1 & 1.2 for Technical Proposal content and format instructions
- Once Technical Proposals are received, they will go through preliminary evaluation & scoring. If a Technical Proposal scores below 70 total points during preliminary scoring, it will be considered non-compliant and will not be considered further.
- NCTA will then Shortlist Proposers based on their Oral Interview & Presentation and finalized Technical Proposal score.

Technical Proposal Scoring

Technical Proposal Sections	Maximum Possible Points
Section 1: Proposer Qualifications	5
Section 2: Key Team Qualifications	10
Section 3: Approach to Scope of Work and Requirements	35
Section 4: Approach to Project Plan and Implementation	25
Section 5: Approach to Integration	20
Section 6: Approach to Maintenance	5
Maximum Possible Technical Points	100

Price Proposal Submittal and Evaluation

- Due February 7, 2025, by 4:00 p.m. EDT
 - ONLY Shortlisted Proposers will submit a Price Proposal
- Refer to RFP Part I, Section 4.5 for Price Review & Scoring details

Best Value

Calculating Lowest Adjusted Price

- **Step 1:** After Price Proposals are reviewed, NCTA may request written clarifications.
- **Step 2:** After written clarification responses, each Shortlisted Proposer will receive a quality credit percentage based on their final technical proposal score.
 - See Table 1-3 in the RFP for each technical score quality credit percentage.
- **Step 3:** Each Shortlisted Proposer's Quality Credit % and Price Proposal \$ amount will be entered into the below table to calculate the lowest adjusted price.
- **Step 4:** The successful Contractor is the Proposer with the lowest adjusted price.
 - In the example below, Vendor C is the successful Contractor.

	Technical Score	Quality Credit %	Price Proposal (\$)	Quality Value (\$)	Adjusted Price (\$)
Vendor A	94.0	60.00%	\$325,000.00	\$195,000.00	\$130,000.00
Vendor B	90.0	50.00%	\$290,000.00	\$145,000.00	\$145,000.00
Vendor C	92.0	55.00%	\$280,000.00	\$154,000.00	\$126,000.00
Vendor D	80.0	25.00%	\$200,000.00	\$50,000.00	\$150,000.00
Vendor E	69.0	0.00%			
Note 1: Maximum Technical Score Percentage is 75%					
Note 2: Minimum Technical Score to Qualify is 70					

Submittal Delivery

- Submittals (both Technical Proposal & Price Proposal) shall be delivered to:

**NC Quick Pass
200 Sorrell Grove Church Rd, Suite A
Morrisville, NC 27560
Attn: Eliza Davis**

- Refer to RFP Part IV, Section 1.3 & 2.3 for further instructions on submissions.
 - NO hard copies, only electronic on a USB flash drive.

Contract Term

The term of the Contract will commence at Notice to Proceed (NTP) based on project phases below:

The project phases are:

- TISDSR Design & Implementation Phase
 - Commences at Notice to Proceed (NTP) and shall continue until System Acceptance by NCTA.

- TISDSR Maintenance Phase (Optional):
 - This phase of work begins at System Acceptance by NCTA to include two (2) two (2)-year optional extensions to be executed at the sole discretion of NCTA, with the first extension commencing upon the end of the Design & Implementation Phase.

Non-Solicitation Provision

- Non-solicitation in accordance with RFP Part I, Section 2.3
- ONLY contact NCTA in the manner identified in RFP Part I, Section 1.4
- Violation may be grounds for rejection of proposal



Scope of Work & Requirements Overview

Manish Chourey

Scope of Work Requirements

- **TISDSR Design & Implementation Requirements**
 - Project Management & Documentation Requirements
 - System Design and Testing Requirements

- **Functional Requirements**
 - General Processing Requirements
 - Monitoring and Logging
 - Security and compliance

- **Functional Capabilities**
 - Design and Develop to Detailed Functional Requirements in six Iterations

- **Integrations**
 - The Contractor shall architect, design, & build the TISDSR such that it will integrate with the capabilities & channels.

- **Performance Requirements**
 - The Contractor shall design and build the TISDSR to meet requirements detailed in Table 3-2

Scope of Work

Key Personnel

Roles	Responsibilities
Project Principle	<ul style="list-style-type: none">• Overall conduct & performance of the implementation• POC for any escalated issues that can't be resolved by the Contract Project Manager
Contract Project Manager	<ul style="list-style-type: none">• All day-to-day work• Overall execution & delivery of the implementation
Lead Business Analyst	<ul style="list-style-type: none">• All requirements gathering, interaction with NCTA business stakeholders, & interfaces with software development team to communicate business requirements into system requirements
Solution Architect	<ul style="list-style-type: none">• Architecture, design, & consultation for the development team for the TISDSR system
Product Owner	<ul style="list-style-type: none">• Overall planning & implementation of the TISDSR testing program• Integration & installation of the TISDSR
Quality Assurance Manager	<ul style="list-style-type: none">• Consistent quality throughout the design, development, testing, & implementation of the TISDSR

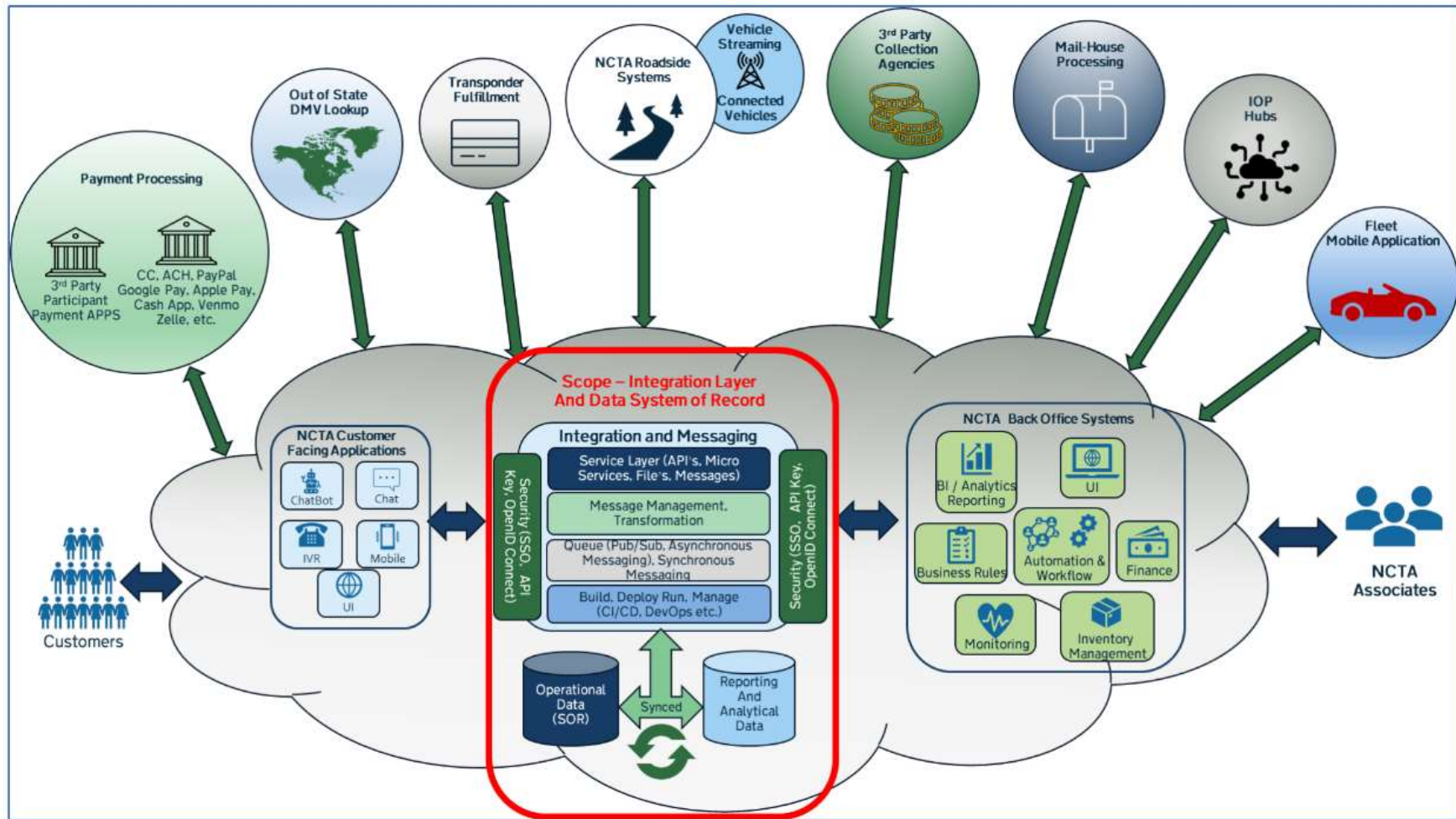
Attachments

Attachment	Description
1. NCQP Business Policies	<ul style="list-style-type: none"> This document contains the business policies by which the North Carolina Turnpike Authority (NCTA) operates its NC Quick Pass® toll collection program.
2. State of NC, Statewide Info Security Manual	<ul style="list-style-type: none"> Provides the statewide security policy for North Carolina State Agencies. Establishes principles to ensure a secure network infrastructure.
3. Sample API Specification	<ul style="list-style-type: none"> Provides a list of sample APIs expected and data elements to be stored in DB. A list (not comprehensive) of expected Services as part of the Scope of Work.
4. Sample Scenario-Based Test Matrix	<ul style="list-style-type: none"> A sample of scenario-based test matrix used by NCTA to accept system and ensure test coverage of business scenarios. During the design and implementation phase, NCTA expects the vendor to develop this matrix and use them for Automated and Manual testing.
5. Change and Release Management Process	<ul style="list-style-type: none"> This document defines the release and change management process to be followed by NCTA resources and vendors.
6. Business Rules	<ul style="list-style-type: none"> Current business rules for account types, transaction processing, financial processing, invoice escalations and Name & Address matching rules.
7. ICDs	<ul style="list-style-type: none"> Existing ICDs for Home and Away transaction processing, Transponder Fulfillment and Real-time Bill Payment.
8. Entity Relationship Diagrams	<ul style="list-style-type: none"> Database key business entity relationship diagrams.
9. Correspondence List	<ul style="list-style-type: none"> List of customer notifications and delivery method.

Project Implementation Schedule

Major Implementation Schedule	Projected Start	Projected End
TISDSR Design & Implementation Phase		
Notice to Proceed (NTP)	February 2025	
Project Kickoff Meeting	February 2025	
Project Planning Documentation	-	40 Calendar Days after NTP
TISDSR Design and Implementation	Est. 94-week Total Duration	
Iteration 1 – Account Management (Iterative Build/Test/Deploy)	Est. 12 Week Duration	
Iteration 2 – Account Assets (Iterative Build/Test/Deploy)	Est. 12 Week Duration	
Iteration 3 – Payment Processing (Iterative Build/Test/Deploy)	Est. 12 Week Duration	
Iteration 4 – Customer Financials (Iterative Build/Test/Deploy)	Est. 12 Week Duration	
Iteration 5 – Transaction and Image Transfer (Iterative Build/Test/Deploy)	Est. 12 Week Duration	
Iteration 6 – Customer Notifications (Iterative Build/Test/Deploy)	Est. 12 Week Duration	
Backlog clean-up	Est. 12 Week Duration	
Remaining Manual API Testing (MAT), Automated API Testing (AAT), and User Acceptance Testing (UAT)	Est. 10 Week Duration	
System Acceptance	-	10 Calendar Days after NCTA Approval of all iterations, backlog cleanup, and remaining testing.
TISDSR Maintenance Phase	Upon System Acceptance	Optional two (2) two (2) year extensions

NCTA Digital Transformation and Modernization End-State



Questions & Answers

Please post your questions in the chat

Closing Remarks

Eliza Davis

Point of Contact



Email: NCTA_Digital_RFP@ncdot.gov