

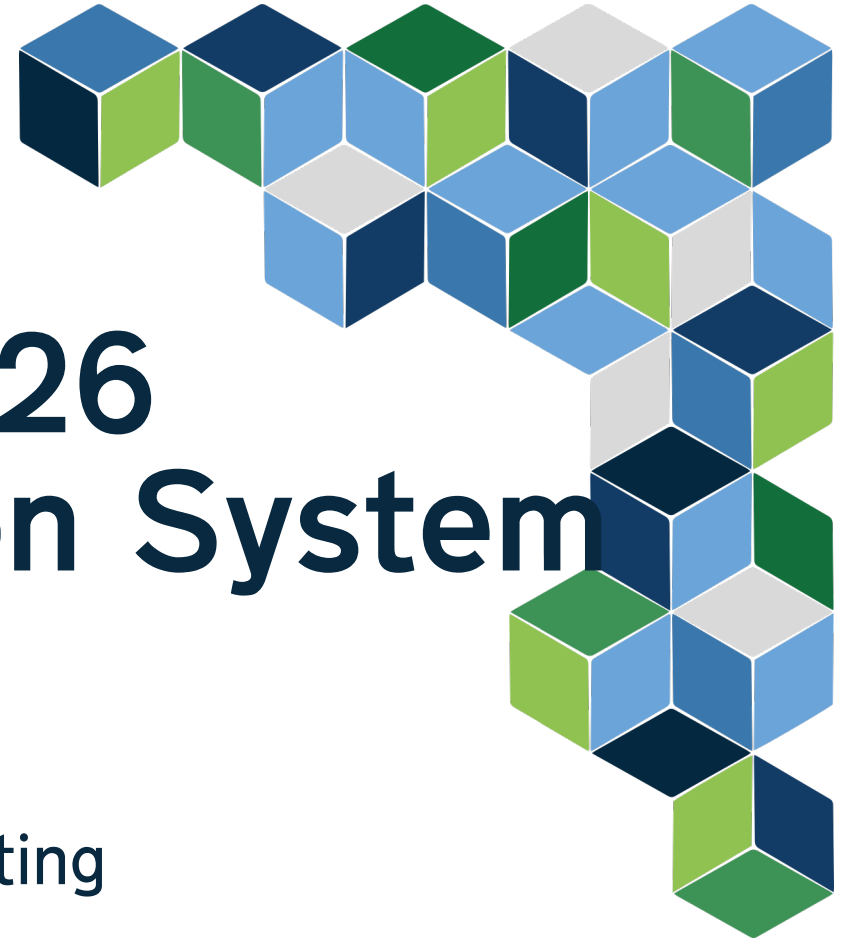


Monroe Expressway 2026 Roadside Toll Collection System RFP

Mandatory Pre-Proposal Scope of Services Meeting

July 1, 2026, 11:00 a.m. – 12:00 p.m. ET

Online via Web conference



Roll call for one person by company

**PLEASE MUTE YOUR LINE IF YOU ARE
NOT SPEAKING**

Welcome and Introductions

Eliza Davis

NCTA Staff Meeting Introductions

Name	Job Title
Eliza Davis	Procurement Specialist II
Manish Chourey	Chief Technology Officer
Jerry Eakes	Director of Roadside Operations

Pre-Proposal Meeting Details

- Post questions via chat and they'll be addressed 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/MonroeRFP.aspx>

Agenda

- Project Introduction & Procurement Goals
- Overview of Procurement Process
- Scope of Work and Requirements Overview
- Project Timeline
- Transition Impact Fees
- Questions and Answers/Closing Remarks

Project Introduction & Procurement Goals

Manish Chourey



NCDOT

North Carolina Department of Transportation

Responsible for all modes of transportation in NC such as highways, rail, aviation, ferries, DMV, etc.

NCTA

North Carolina Turnpike Authority

A department of NCDOT. Responsible for all toll projects in NC.

NCQP

NC Quick Pass

NCTA's public-facing brand for tolling and toll collection once a toll project opens to traffic.

Monroe Expressway, U.S. 74 By-Pass Location Map



Monroe Expressway 2026 RTCS RFP Goals

- Deploy a modern toll collection system using the existing overhead gantry with no in-pavement sensors for detection or classification.
- Implement an AVI system aligned with RTCS needs, using only approved *E-ZPass* certified equipment.
- Minimize physical infrastructure for toll collection system deployment.
- Provide a highly resilient, scalable, modular system architecture that can integrate with evolving technologies.
- Optimize efficiency with a lightweight Transactions Reconciliation Host (TRH).
- Provide a secondary OCR and centralized Image Verification Services across NC roadways. OCR is required for all (AVI and Image) transactions.

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/MonroeRFP.aspx>
 - RFP
 - Exhibits
 - Attachments
 - Appendices
- Attachments & Appendices both include supporting documentation to the RFP.
- Exhibits include forms that are to be filled out and submitted with proposal submissions.
 - See RFP Part IV, Section 1.1. & Section 2.1 for the proposal forms and submittal checklists.

Procurement Schedule

Category	Date
RFP Issued	June 22, 2026
RSVPs Due for Mandatory Pre-Proposal Meeting	July 1, 2026 (10:00 a.m. ET)
Mandatory Pre-Proposal Scope of Services Meeting	July 1, 2026 (11:00 a.m. to 12:00 p.m. ET)
Proposer Questions Due	July 15, 2026 (4:00 p.m. ET)
NCTA Response to Questions	July 29, 2026
Technical Proposals AND Price Proposals Due	August 26, 2026 (4:00 p.m. ET)
Notification of Proposers Shortlisted	September 24, 2026
Oral Interviews & Presentations	Week of October 5, 2026
Ranking of Shortlisted Proposers for Negotiations	October 16, 2026
BAFO (if needed)	Week of October 19, 2026
Notice of Award	Week of October 26, 2026

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

Proposer Questions

- Due July 15, 2026, by 4:00 p.m. ET
- All questions and comments to be submitted using **Exhibit C-4: Proposer Questions Form**.
- All questions and comments must be submitted via emailed to:
ncta_monroe_rtcs_rfp@ncdot.gov
- NCTA will provide responses July 29, 2026, and publish Addenda, if required.

Technical Proposal Submittal and Evaluation

- Due August 26, 2026, by 4:00 p.m. ET
 - Refer to RFP Part IV, Section 1 for Technical Proposal content and format instructions.
- Once Technical Proposals are received, they will go through preliminary evaluation and scoring. If a Technical Proposal scores below 70 out of 100 points during preliminary scoring, it will be considered non-compliant and will not be considered further.
- Proposers who score above 70 during preliminary evaluation and scoring may be eligible to be shortlisted. The top-ranked shortlisted Proposers will be invited to participate in oral presentations and interviews.

Technical Proposal Scoring

Technical Proposal Sections	Maximum Possible Points
Section 1: Proposer Qualifications	5
Section 2: Key Team Qualifications	5
Section 3: Approach to Scope of Work and Requirements	30
Section 4: Approach to Project Plan, Implementation, Interfaces, and Testing	25
Section 5: Approach to Transition	10
Section 6: Approach to Operations & Maintenance	20
Section 7: Adherence to the Scope of Work & Requirements, T&Cs, and Requirements Conformance Matrix	5
Maximum Possible Technical Points	100

Price Proposal Submittal and Evaluation

- Due August 26, 2026, by 4:00 p.m. ET
 - In a separate sealed envelope from the Technical Proposal.
 - Refer to RFP Part IV, Section 2 for Price Proposal content and format instructions.
- Refer to RFP Part I, Section 4.5 for price review and 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 top-ranked shortlisted Proposer will receive a quality credit percentage based on their final technical proposal score.
 - See Table I-3 in the RFP for each technical score quality credit percentage.
- **Step 3:** Each top-ranked 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 one 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: Minumum Technical Score to Qualify is 70					

Submittal Delivery

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

NCTA
2501 Aerial Center Parkway, Suite 200
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 submissions on a USB flash drive.

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.
- A violation may be grounds for rejection of the proposal.

Scope of Work & Requirements Overview

Manish Chourey

Scope of Work Requirements

- **Roadside Support System Project, Design, Testing and Implementation Documentation Requirements (#1-194)**
 - Details the requirements for project execution and how the Proposers must document their approach to meet them.
- **RTCS Functional Requirements (#195-372)**
 - Details all functional requirements for lane function, host function, data reporting and retention and external interfaces.
- **Maintenance Responsibilities & Services (#373-456)**
 - Details all monitoring, preventive maintenance, corrective maintenance and related elements required during the Maintenance and Operations Phase of the Project.
- **Performance Requirements – Maintenance & Operations (#457-499)**
 - The Contractor shall design and build the system to meet these requirements.
 - A summary of the Performance Requirements can be found in RFP *Table III-2: Monthly Performance Requirements*
- **Transition Requirements (#1000-1042)**
 - The transition from the legacy RTCS to the new RTCS are cover with these requirements in Attachment 12: Transition Requirements.

Scope of Work

Key Personnel

Roles	Responsibilities
Project Principal	• Overall conduct & performance of the Project. • POC for any escalated issues that can't be resolved by the Contractor Project Manager.
Contractor Project Manager	• All day-to-day work. • Overall execution & delivery of the Project.
Technical Manager	• Overall RTCS solution architect. • Manage design, development & implementation of the technology solution & resources related to the RTCS & interfaces to NCTA provided OBO.
Installation Manager	• Installation & commissioning of the RTCS & external interfaces.
Maintenance Manager	• Maintenance services of the RTCS & external interfaces.
Quality Assurance Manager	• Consistent quality throughout design, development, testing & implementation of the Project.
Test Manager	• Overall planning & implementation of the Project's testing program.
Transition Manager	• POC for all RTCS transition-related activities. • See Attachment 12: Transition Requirements for additional info.

Attachments

Attachment	Description
1. NCQP Business Policies	This document contains the business policies by which the NCTA operates its NC Quick Pass® toll collection program.
2. State of NC, Statewide Info Security Manual	- Provides the statewide security policy for North Carolina State Agencies. - Establishes principles to ensure a secure network infrastructure.
3. Preventative Maintenance Checklist	A high-level list of the preventative maintenance activities required for the Project.
4. ITS, AET, & RTCS As-Built	As-Built Plan sets for the ITS, AET Infrastructure, and select parts of the legacy RTCS.
5. Project Responsibility Matrix	Matrix of stakeholder responsibilities for the implementation and maintenance of the toll facility.
6. Equipment Re-Use Matrix	Guide to what assets may or may not be reused for the project.
7. OBO ICD	- The interface specifications for the data exchange between RTCS and OBO. <u>Note</u>: This document is in draft form; to be finalized during the design phase.
8. Lane Closure Restrictions	- Initial lane closure restrictions for implementation and operations. <u>Note</u>: Subject to change based on observed traffic volumes.
9. Future Transaction Projections	- Projected traffic statistics from the NCTA Traffic and Revenue Study completed in 2026. <u>Note</u>: These values are estimates, so Proposers should apply conservative factor of safety when used.
10. KPI Guidebook	- Instruction on how to measure the KPI's outlined in the RFP requirements. - Any deviation from these methods is subject to NCTA review and approval.

Attachments (Cont.)

Attachment		Description
11. Transition Impact Fees	• Instructions and worksheets to calculate predicted and realized transaction and revenue impacts due the activities to install and transition the RTCS.	
12. Transition Requirements	• Additional requirements specifically addressing the transition from the legacy RTCS to the new RTCS.	
13. Toll Location Photo Tour	• A collection of photographs and notes showing key points of the toll zone infrastructure and supporting systems.	

Project Timeline

Jerry Eakes

Project Implementation Schedule – Part 1

Exhibit A – Project Implementation Schedule		
Major Milestone Description	Projected Start	Projected End
Implementation Phase Notice to Proceed (NTP)	Nov 26	--
Project Kickoff Meeting	Nov 26	--
Project Planning Documentation (Project Schedule, Project Management Plan, Master Test Plan)	Nov 26	60 Calendar Days after NTP
System Design		
Requirements Review / Business Rules Workshops	Nov 26	Dec 26
Bill of Materials	Dec 26	Jan 27
Third Party Hardware and Software Documentation Submitted	Jan 27	Jan 27
System Detailed Design Document (SDDD) Approval	Feb 27	May 27
RTCS Installation Design and Documentation Package Approval	Mar 27	May 27
Installation Plan Approved	May 27	Jun 27

Project Implementation Schedule – Part 2

RTCS, Installation and Test		
Major Milestones: Factory Acceptance Test (FAT)	Jul 27	Aug 27
NCTA OBO Interface Test	Sep 27	Sep 27
Maintenance Plan and Training Plan	Sep 27	Oct 27
Installation	Oct 27	May 28
Installation and Commissioning Approved Ready for Go Live - Tolling Location 1 Installation and OIT	Oct 27	Nov 27
Major Milestone: Toll Zone commissioning for revenue service during Site Installation Test - Installation and Site Installation Test of Monroe Expressway Installation and Commissioning Approved Ready for Go Live - Tolling Locations 2 – 14.	Dec 27	May 28
Training Complete	Sep 27	May 28
Final Testing and Phase Closeout		
Start of Maintenance		Nov 27
System Acceptance Test (SAT)		Jun 28
As-Built System Detailed Design Document (SDDD) Approved		Aug 28
As-Built Drawing Package Approved		Aug 28

Contract Term

The term of the Contract will commence at Notice of Award based on Project Phases below:

The Project Phases are:

- Implementation Phase
 - Commences upon issuance of Implementation Phase Notice of Award and ends upon System Acceptance.
- Operations & Maintenance Phase
 - Commences upon Go-Live and shall continue through the end of the base Contract Term for a period of up to five (5) years.
- Optional Extension Phase
 - Includes two (2) optional three (3)-year Maintenance extensions to be executed at the sole discretion of NCTA, with the first extension commencing upon the end of the base Contract Term.



Transition Impact Fees

Jerry Eakes

Transition Impact Fees

- Fees will be charged to the RTCS Contractor to compensate NCTA for any lost transaction revenue due to system degradation or outage during transition.
- Fees are based on historic volumes and the toll rate for Class 1 ETC transactions in 2028, when the transition will take place.
- Starting when the existing toll system is first impacted by the RTCS Contractor, the RTCS Contractor will be charged the daily Transition Impact Fee found in **Attachment 11**.
- The Transition Impact Fee assessment will end when the RTCS Contractor is able to validate to NCTA that their system is operating at an acceptable performance level.
- Any transaction successfully created during this transition phase will be deducted from the count of transactions used in the Transition Impact Fee assessment.

Att 11 Monroe Replacement RTCS_Transition Impact Fees - 2028 Rates_LOCKED

Daily Fees →

Average Hourly
Transaction
Volume
(Informational)

TZ - Hour	Sunday		Monday		Tuesday		Wednesday		Thursday	
	Trxns	Rev	Trxns	Rev	Trxns	Rev	Trxns	Rev	Trxns	Rev
M02 Daily Total	10,360	\$3,315.26	13,329	\$4,265.26	14,175	\$4,536.12	14,411	\$4,611.38	14,250	\$4,559.86
M02 - 0	93	\$29.72	72	\$23.00	69	\$22.07	69	\$22.19	77	\$24.71
M02 - 1	60	\$19.18	48	\$15.43	50	\$16.05	53	\$17.07	58	\$18.60
M02 - 2	42	\$13.35	44	\$14.09	50	\$16.10	52	\$16.77	54	\$17.33
M02 - 3	39	\$12.52	67	\$21.59	82	\$26.17	85	\$27.30	85	\$27.25
M02 - 4	44	\$14.17	131	\$41.77	141	\$44.98	143	\$45.81	142	\$45.39
M02 - 5	84	\$26.93	371	\$118.59	402	\$128.71	409	\$130.77	376	\$120.39
M02 - 6	172	\$54.98	1,000	\$320.02	1,142	\$365.54	1,147	\$366.88	1,075	\$343.87
M02 - 7	202	\$64.50	1,417	\$453.29	1,670	\$534.51	1,665	\$532.88	1,565	\$500.81
M02 - 8	355	\$113.73	1,028	\$329.05	1,190	\$380.72	1,177	\$376.67	1,087	\$347.82
M02 - 9	540	\$172.65	810	\$259.04	897	\$287.07	887	\$283.90	830	\$265.58
M02 - 10	658	\$210.55	768	\$245.88	801	\$256.21	808	\$258.66	787	\$251.97
M02 - 11	766	\$245.14	786	\$251.55	776	\$248.41	786	\$251.59	776	\$248.34

Transition Impact Fees

- The tool used to calculate the fees is provided in **Attachment 11** with a few examples prepopulated.
- This tool is available for Proposers to input values and assess anticipated fees, based on their transition plan.
- During proposal reviews, NCTA will be reviewing the alignment of the Proposers' transition plan against their estimated Transition Impact Fees for feasibility and scoring accordingly.

Att 11_Monroe Replacement RTCS RFP_Transition Impact Fee Example_20260609

Daily Fees for each
day of week

Historical Daily Transaction Counts			
Location	All Trans	Total Revenue	Day of Week
M02	13,329	\$5,065.02	Monday
M02	14,175	\$5,386.50	Tuesday
M02	14,411	\$5,476.18	Wednesday
M02	14,250	\$5,415.00	Thursday
M02	15,500	\$5,890.00	Friday
M02	11,310	\$4,297.80	Saturday
M02	10,360	\$3,936.80	Sunday

2028 Rate for the
subject location

Toll Rates	
ETC Class 1	
Rate:	\$0.38

Att 11_Monroe Replacement RTCS RFP_Transition Impact Fee Example_20260609

Baseline Assesment Based on Historical Records					Processed Transactions			Calculated Loss	
							Total:	26,974	\$10,250.12
					Notes:	AVI Trxn	IMG Trx	Trxn Difference	
9/8/2028	M02	15,500	\$5,890.00	Friday	Cutover 2PM	6500	500	8,500	\$3,230.00
9/9/2028	M02	11,310	\$4,297.80	Saturday			7000	4,310	\$1,637.80
9/10/2028	M02	10,360	\$3,936.80	Sunday			7000	3,360	\$1,276.80
9/11/2028	M02	13,329	\$5,065.02	Monday			8000	5,329	\$2,025.02
9/12/2028	M02	14,175	\$5,386.50	Tuesday			10000	4,175	\$1,586.50
9/13/2028	M02	14,411	\$5,476.18	Wednesday			14,211	200	\$76.00
9/14/2028	M02	14,250	\$5,415.00	Thursday			14,050	200	\$76.00

Values from top left table copied into lower table for the Baseline Assessment.

Successfully processed transactions are input here and subtracted from the Baseline.

The final daily fee is calculated here and summed at the top.

Transition Impact Fees

- Once the transition of a toll zone is complete and the new site is commissioned and in full operation, the Transition Impact Fees will be finalized and agreed to by NCTA and the Contractor.
- The Contractor will pay these fees to NCTA before they are eligible to invoice for Payment Milestone A-7, as detailed in the RFP material.
 - RFP Part V: Terms & Conditions, Section 1.4.4 Transition Impact Fees
 - **Attachment 11: Transition Impact Fees**
 - **Exhibit D: Payment Schedule**

Questions & Answers

Please post your questions in the chat

Closing Remarks

Eliza Davis

Point of Contact



Procurement Email: ncta_monroe_rtcs_rfp@ncdot.gov