



## ADDENDUM NO. 1

### REQUEST FOR PROPOSAL FOR MANAGEMENT INFORMATION SYSTEM

RFP NO.: 2022-FP-09

Date Issued: June 7, 2022

#### INSTRUCTIONS:

- (1) PROPOSER is required to comply with this Addendum No. 1.
- (2) This Addendum No. 1 becomes a part of this Request for Proposal.
- (3) **PROPOSER is required to acknowledge this Addendum No. 1 in the proper place on the Certification and Statement of Qualifications form.**
- (4) For additional information, please contact Christina Perez, Director of Procurement, or Sherrié Clay, Procurement Administrator, at (361) 289-2712.

This Addendum No. 1 is issued to make the following changes and clarifications on RFP No. 2022-FP-09:

1. **The Corpus Christi Regional Transportation Authority (CCRTA) has revised the address listed in the first sentence on page 1 of 109 as follows:**

#### Current:

Proposals will be received at the offices of the Corpus Christi Regional Transportation Authority, hereinafter called the "CCRTA", at 600 N. Staples Street, Corpus Christi, Texas 78401 or by email at [procurement@ccrta.org](mailto:procurement@ccrta.org) until 3:00 p.m. (CST) Thursday, June 30, 2022 for a cloud-based Management Information System.

#### Revised:

Proposals will be received at the offices of the Corpus Christi Regional Transportation Authority, hereinafter called the "CCRTA", at **602** N. Staples Street, Corpus Christi, Texas 78401 or by email at [procurement@ccrta.org](mailto:procurement@ccrta.org) until 3:00 p.m. (CST) Thursday, June 30, 2022 for a cloud-based Management Information System.

**2. The CCRTA has modified the RFP to include the electronic submission of proposals as follows:**

Proposer's email submission must be less than 30MB. If your email submission is more than 30MB, submit your proposal via a file storage service such as drop box, hightail, etc. If you choose to submit via a file storage service, send a link to [procurement@ccrta.org](mailto:procurement@ccrta.org) for the files to be accessed.

**3. The CCRTA has revised Section 7 Opening Proposals located in the "Instructions to Proposers" as follows:**

Current:

**7. OPENING PROPOSALS.**

All proposals shall be opened by the CCRTA as soon after the proposal deadline as is reasonably practicable. Information submitted in response to the Request for Proposals shall not be released by the CCRTA during the proposal evaluation process or prior to Contract award. Proposers are advised that the CCRTA may be required to release proposal information, other than trade secrets, after Contract award.

**Proposers are welcome to attend the Proposal Closing on the second floor of the CCRTA's Staples Street Center located at 602 N. Staples Street, Corpus Christi, TX 78401. To attend the Proposal Closing via GoToMeeting, please submit a login request to [procurement@ccrta.org](mailto:procurement@ccrta.org) by 12:00 p.m. (CST) Thursday, June 30, 2022. Only the names of the Proposing Firms that submitted proposals will be announced. Price Schedules will not be opened.**

Revised:

**7. OPENING PROPOSALS.**

All proposals shall be opened by the CCRTA as soon after the proposal deadline as is reasonably practicable. Information submitted in response to the Request for Proposals shall not be released by the CCRTA during the proposal evaluation process or prior to Contract award. Proposers are advised that the CCRTA may be required to release proposal information, other than trade secrets, after Contract award.

**Proposers are welcome to attend the Proposal Closing on the**

second floor of the CCRTA's Staples Street Center located at 602 N. Staples Street, Corpus Christi, TX 78401 at 3:30 p.m. (CST), Thursday, June 30, 2022.

To attend the Proposal Closing via GoToMeeting, please submit a login request to [procurement@ccrta.org](mailto:procurement@ccrta.org) by 12:00 p.m. (CST) Thursday, June 30, 2022. Only the names of the Proposing Firms that submitted proposals will be announced. Price Schedules will not be opened.

4. **The CCRTA has revised Section 1.1 located under "Management Information Software" on page 21 of 109 to add a thirteenth (13<sup>th</sup>) core module under the current Twelve (12) Core Modules. The new list of Thirteen (13) Core Modules is as follows:**

**Thirteen (13) Core Modules** which consist of:

1. General Ledger
2. Accounts Payable
3. Grant Management/Project Tracking
4. Fixed Assets
5. Accounts Receivable, Cash Management, Billing and Invoicing
6. Payroll Management
7. Timekeeping
8. Human Resources
9. Purchase Order Processing and Contract Management
10. Inventory, Fleet Maintenance and Operations
11. Customer Help Desk
12. Budgeting
13. Transit Asset Management

5. **The CCRTA has revised Section 1.2 located under “Management Information Software” on page 21 of 109 to remove the seventh (7<sup>th</sup>) additional module from the Additional Seven (7) Modules. The new list of Additional Six (6) Modules is as follows:**

**1.2 Additional Six (6) Modules needed, but are optional include:**

1. Claims and Safety
2. Revenue and Ridership Statistics
3. Public Schedules
4. ADA Paratransit Eligibility Processing Database
5. National Transit Database Reporting (NTD)
6. Bid Process Management

6. **The CCRTA has revised Section 15.3 Fleet Maintenance located under “Management Information Software” on page 53 of 111 to add 31 Fleet Maintenance Users as listed in number twelve (12) below:**

**15.3 FLEET MAINTENANCE**

1. DASH BOARD: Current Fleet Inventory Status In/Out of Service total count of Vehicles, Out of Service for no Parts, Total Miles operator MTD (Miles to Date), Fuel Consumption Running Total, Open Work Orders, PMI scheduling and Forecasting, DVIR’s status: complete or pending to include YTD status, Road Calls Running Total, Labor Hours available for all active shifts, Total Inventory Expenses YTD.
2. Maintain a vehicle file that stores all pertinent vehicle information required to identify vehicles, record month-to-date (MTD), YTD, and life-to-date (LTD) costs associated with a vehicle, preventative maintenance parameters and NTD data.
3. Provide for daily entry and automated fuel island import of consumables auditing data. Account for miscellaneous consumables’ issues.
4. Accommodate pump meter and tank measure readings. Provide audit reports for the same.
5. Allow service entry by hub or mileage readings and accommodate off-site serving.

6. Automatically update daily service costs to vehicle file and updated mileage.
7. Provide a service audit report noting any vehicle usage discrepancies.
8. Provide inspection forecast reports for all vehicles and allow users to define preventive maintenance (PM) checklists by miles, days hours, and gallons for each PM inspection type and print PM checklists for vehicles due for inspection.
9. Provide a list of vehicles overdue for inspection. No overdue ones allowed.
10. Maintains a tire file that identifies tire usage and costs with mileage automatically updated.
11. Records tire change information and assigns tires to a specific vehicle.
12. 31 Fleet Maintenance users
13. Provide standard and customize vehicle reports and inquiries:
  - a. Vehicle listing
  - b. Fleet exception standards
  - c. Pump and tank audit reports
  - d. Pump and tank lists
  - e. Daily and monthly fuel and oil detail and averages by vehicle
  - f. Monthly mileage report

7. **The CCRTA has revised Sub-Section 6 of Section 15.6 Work Orders located under “Management Information Software” on page 56 of 111 to add 12 Work Order Users as listed below:**

### **15.6 WORK ORDERS**

1. Record and store work order information by vehicle. The parts used must reduce on-hand inventory quantities immediately (real time) and interface to general ledger inventory and expense accounts. Rebuilds and components also must be accommodated.
2. Work order numbers are assigned automatically by the system allowing separate set of numbers based on repair location and asset type. Manual entry is also accommodated for pre-printed work-orders.
3. Accommodates for Notes entry by mechanic and/or supervisors. Ability to insert objects such as schematics or pictures is included.
4. Prints barcoded work-orders immediately upon assignment of work by supervisor.
5. Accommodates tool inventory tracking tasks to be used with Employee Assignments, and Employee time clock usage.
6. The following inquiries are provided:
  - a. Vehicle work-order history inquiry
  - b. Work-order inquiry
  - c. Work order detail by vehicle/component/rebuild item number
  - d. Work order general ledger audit and interface to subsidiary general ledger journal
  - e. Work order detail by customers
  - f. Work order detail by other items
  - g. Work order detail by operation
  - h. Work-order totals by class code
  - i. List open work-orders
  - j. Operation code listing

- k. A weekly and monthly graph report of work orders completed using Vehicle Maintenance Repair System (VMRS) specific codes
- l. 12 Work Order Users.

**8. The CCRTA has removed Section 24.0 Transit Asset Management (TAM) from the Optional Modules and placed it under Core Modules as Section 18.0 as listed below:**

**18.0 Transit Asset Management (TAM)**

The CCRTA is aware that this module would be a fully customized to fit the agency's needs.

TAM is a broad system for monitoring and managing the condition of public transportation assets. TAM's is a business model that prioritizes funding based on condition and performance to achieve and maintain a state of good repair (SGR) for the nation's public transportation assets. It is a strategic and systematic process through which an organization procures, operates, maintains, rehabilitates, and replaces transit assets to manage their performance, risks, and costs over their lifecycle to provide safe, cost-effective, and reliable service. Four required core components of TAM are:

- Equipment: Percentage of nonrevenue vehicles met or exceeded Useful Life Benchmark
- Rolling Stock: Percentage of revenue vehicles met or exceeded Useful Life Benchmark
- Infrastructure: Percentage of track segments with performance restrictions
- Facilities: Percentage of assets with condition rating below 3.0 on FTA TERM Scale
- Weblink for more information related to TAM
  - <https://www.transit.dot.gov/TAM/>

**18.1 Assets Included in Plan**

It is expected that all assets used in the provision of public transit will be included in the TAM Plan asset inventory. This includes (with the exception of equipment) assets that are owned by a third party or shared resources. The inventory must include all service vehicles, and any other owned equipment assets over \$50,000 in acquisition value. Agencies only need to include condition assessment for assets for which they have direct capital responsibility.

## 18.2 State of Good Repair

The condition in which a capital asset is able to operate **at full level of performance. A capital asset is in a state of good repair when that asset:**

- Is able to perform its designed function
- Does not pose a known unacceptable safety risk, and Its lifecycle investments must have been met or recovered

## 18.3 Performance Management

Asset performance is measured by asset class, which means a subgroup of capital assets within an asset category. The following table shows assets for which performance needs to be reported to the NTD and the associated performance measures.

<b>Assets:</b> <i>Only those for which agency has direct capital responsibility</i>	<b>Performance Measure</b>
<b>Equipment:</b> Non-revenue service vehicles by asset class	Percentage of non- revenue vehicles met or exceeded Useful Life Benchmark
<b>Rolling Stock:</b> Revenue vehicles by asset class	Percentage of revenue vehicles met or exceeded Useful Life Benchmark
<b>Infrastructure:</b> Only rail fixed-guideway, track, signals and systems	Percentage of track segments with performance restrictions
<b>Facilities:</b> Maintenance and administrative facilities; passenger facilities and parking facilities	Percentage of assets with condition rating below 3.0 on FTA TERM Scale

## 18.4 Useful Life Benchmark:

The expected lifecycle of a capital asset for a particular Transit Provider's operating environment, or the acceptable period of use in service for a particular Transit Provider's operating environment\

## 18.5 Target Setting

Targets should be set by each transit provider or TAM plan sponsor for each applicable asset class for the coming fiscal year. To the extent feasible, targets should be supported by data such as the most recent condition data and reasonable financial projections for the future.



## **18.6 Timeframes/Reporting**

A TAM plan must be updated in its entirety at least every 4 years, and it must cover a horizon period of at least 4 years. An initial TAM plan was required by October 2018; an updated TAM plan is required by October 1, 2022.

9. The CCRTA has revised the Price Schedule (Appendix A).

**In order for your proposal to be deemed responsive and considered for this contract award, your prices must be submitted on the enclosed Revised Price Schedule (Appendix A).**

The Revised Price Schedule (Appendix A) is below:

**APPENDIX A**

**REVISED PRICE SCHEDULE**

**RFP No.:** 2022-FP-09

**Proposer:** \_\_\_\_\_

Management Information System

**Instructions:**

- 1) Refer to the "Scope of Work" and "Management Information System" sections before completing the Price Schedule and quote your best price.
- 2) This is a five-year supply and service contract.
- 3) **Submit one original Price Schedule.** On the outside of your sealed proposal address your envelope with the information as noted in the "Instructions to Proposers" Section 5 or submit your complete proposal package electronically to [procurement@ccrta.org](mailto:procurement@ccrta.org) prior to the deadline of 3:00 p.m. (CST) Thursday, June 30, 2022.

**FIVE YEAR BASE**

Item Description	Unit Price	Total Price
MIS Software (Five (5) Year Base)		
Software Maintenance (Five (5) Year Base)		
Unlimited End User Support (Five (5) Year Base)		
Implementation Services Fees		
End User Training (Onsite)		
End User Training (Remote)		
Administrator Training		
Interface Cost (If Applicable)		
Travel Expenses		
Hardware (Time Clocks, Scanners, and Additional Hardware)		
Access for 91 Users (List the Cost Per User in the Unit Price)		
<b>Five Year Base Total</b>		

**APPENDIX A**  
**REVISED PRICE SCHEDULE CONTINUED**

**RFP No.:** 2022-FP-09

**Proposer:** \_\_\_\_\_

Management Information System

**FIVE YEAR BASE**

**OPTIONAL MODULES**

Item Description	Unit Price	Total Price
Claims and Safety		
Revenue and Ridership Statistics		
Public Schedules		
ADA Paratransit Eligibility Processing Database		
National Transit Database Reporting (NTD)		
Bid Process Management		
<b>Five Year Base Optional Modules Total</b>		

**APPENDIX A**  
**REVISED PRICE SCHEDULE CONTINUED**

**RFP No.:** 2022-FP-09

Management Information System

**Proposer:** \_\_\_\_\_

**WARRANTY**

<b>Management Information System</b> Minimum 12-Month Warranty	<b>If Yes</b> <b>(check below)</b>	<b>If Not</b> <b>(State Warranty Term)</b>

**Note: Warranty must be included in your five (5) year base total.**

**Authorized by:**

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

10. The CCRTA has revised the Proposer Compliance Questionnaire To The Scope of Work (Exhibit A).

**In order for your proposal to be deemed responsive and considered for this contract award, your responses to the Proposer Compliance Questionnaire (Exhibit A) must be submitted on the Revised Proposer Compliance Questionnaire To Scope of Work (Exhibit A).**

The **Revised Proposer Compliance Questionnaire To The Scope of Work (Exhibit A)** is a separate Microsoft Excel File.