

PORT AUTHORITY OF ALLEGHENY COUNTY
D/B/A PITTSBURGH REGIONAL TRANSIT

TRANSMITTAL MEMORANDUM NO. 1

TO: All Holders of Request for Proposal No. 26-02

SUBJECT: Financial Audit and Pension Plan Audit Services
Request for Proposal No. 26-02

DATE: February 27, 2026

Please find enclosed the following:

- *RFP 26-02 Information Meeting Agenda*
- *RFP 26-02 Information Meeting Minutes*
- *RFP 26-02 Information Meeting Attendance Sheet*
- *RFP 26-02 Questions and Responses #1-21*
- *RFP 26-02 Addendum #1*
- *RFP 26-02 Information Meeting Presentation Slides*

The following signature acknowledges the receipt of this Transmittal Memorandum No. 1.

Signature

Name of Company

Date

Sign above and return signature page only promptly upon receipt to:

Port Authority of Allegheny County d/b/a Pittsburgh Regional Transit
Purchasing and Materials Management Department
345 Sixth Avenue, Third Floor
Pittsburgh, PA 15222-2527

Attention: Fred Buckner

PORT AUTHORITY OF ALLEGHENY COUNTY
d/b/a PITTSBURGH REGIONAL TRANSIT

Financial Audit and Pension Plan Audit Services
Request for Proposal No. 26-02

February 25, 2026
Information Meeting Agenda

DATE: Wednesday, February 25, 2026

TIME: 9:30 a.m.

SEQUENCE:

- A. Introduction
- B. Contacts for Proposer Questions

Procedural and eBusiness Registration Questions:

Fred Buckner – PRT (412) 566-5467
Fbuckner@rideprt.org

Contact for Diverse Business Enterprises' Questions:

Renelda Colvin – PRT (412) 566-5383
RColvin@rideprt.org

Questions Relating to Schedule of Activities and Scope of Services must be emailed to:

Fred Buckner – Fbuckner@rideprt.org

- C. Review of RFP Document and Proposal Requirements
- D. Overview of Scope of Services
- E. Questions & Answers
- F. Wrap-Up

PORT AUTHORITY OF ALLEGHENY COUNTY
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Financial Audit and Pension Plan Audit Services
Request for Proposal No. 26-02

February 25, 2026
Information Meeting Minutes

The Information Meeting for the above-referenced Request for Proposal (RFP) was held on February 25, 2026 at 9:30 AM. A copy of the attendance sheet is attached.

Fred Buckner, Senior Contract Specialist, opened the meeting for Pittsburgh Regional Transit (PRT). The other PRT attendees making presentations were Peter Schenk, Controller and Renelda Colvin, Contract Compliance Specialist.

Mr. Buckner discussed the following issues:

- Proposers are directed to the RFP for instruction requirements. All requirements are addressed in the RFP documents.
- Electronic proposals must be both received and timestamped by a member of the Procurement Department through PRT's eBusiness website at or before **2:00 p.m.**, prevailing time, **March 10, 2026**, at <http://ebusiness.rideprt.org>.
- Proposals received after the advertised time for the submission of proposals shall be non-responsive and therefore ineligible for award. Each Proposer shall be solely responsible for assuring that its proposal is timely received and time stamped in accordance with the requirements herein.
- All procedural questions concerning this RFP should be directed to Fred Buckner at (412) 566-5467. All questions concerning clarifications **must** be submitted in writing to the attention of Mr. Buckner of the Procurement Department and may be e-mailed to fbuckner@rideprt.org. PRT will not respond to questions received, other than procedural, after **March 5, 2026**. Verbal questions will not be honored in any future Agreement.

Ms. Colvin discussed the following issues:

Section 2.1.2 of the proposal outlines the Diverse Business (DB) participation requirements. Proposed DB utilization is taken into consideration in the proposal evaluations as indicated in Exhibit 8.

PRT is aware of the Department of Transportation's Interim Final Rule (DOT IFR), effective October 3, 2025, regarding the changes to Disadvantaged Business Enterprise (DBE) program requirements for federally funded projects. However, RFP No. 26-02 is a state and locally funded project, so the federal DBE rule is inapplicable. Rather, the Commonwealth of Pennsylvania's Diverse Business Participation law, Title 74 Pa. C.S. § 303, remains applicable and effective for this solicitation. This position is specific to this RFP and is subject to change in future solicitations based on further legal or regulatory developments.

The Pennsylvania DB law defines a "diverse business" as a "disadvantaged business, minority-owned or women-owned business or service-disabled veteran-owned or veteran-owned small business that has been certified by an acceptable third-party certifying organization." Third-party certifying organizations are defined to include:

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1. National Minority Supplier Development Council;
2. Women's Business Development Enterprise National Council;
3. U.S. Small Business Administration;
4. Department of Veterans Affairs; and
5. Pennsylvania Unified Certification Program.

All proposed DBs must be PA certified with the Pennsylvania Department of General Services (DGS) Small Diverse Business Program as an MBE, WBE, SDVBE or VBE at the time of proposal submission. The searchable directory of PA certified DBs is located at www.dgs.internet.state.pa.us/suppliersearch. Please note that you will need to provide written documentation of each DB's certification with your proposal.

The proposer should provide adequate time for DBs to respond to their solicitation.

Inclusion of DB participation is part of the evaluation process. If there is no DB participation, the proposer will provide their good faith effort documentation that will be reviewed by the PRT Office of Small Business Engagement as part of the proposal review process.

Good faith documentation **will** include the following for each DB contacted:

- DB firm name, contact information, contact person, date of contact, and type of contact (email, phone call)
- Description of the scope of work that was provided to the DB along with the date it was provided
- Documentation of the response received from the DB
- Dates of follow-up discussions
- Explanation for why a commitment with a DB was not made (if applicable)
- If pricing is a factor for the selection of non-DB(s) rather than a DB(s), provide quotes for both firms that show scope of work, price, quote date, and date and time the quote was received

Please be advised that the following does not constitute a good faith effort:

- Sending mass emails
- Contacting DBs using only one method – for example, if an email was sent and no response from the DB was received, follow up with the DB by phone

If assistance is required in identifying DBs to utilize, or how to become a certified DB, or any other questions relating to DB participation, proposers should contact Sue Broadus at 412-566-5257 or Renelda Colvin at 412-566-5383. They can be reached by email at SBE@rideprt.org.

The proposer will be required to report on its DB usage throughout the duration of the contract. Please be advised that any changes to your subcontractor participation plan, whether DB or non-DB, must be

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reported to the PRT Office of Small Business Engagement immediately. Please note that there are penalties imposed for non-compliance with the DB program.

- All questions relating to clarifications of, or modifications to, the RFP **must be in writing**. If any questions submitted require the issuance of an addendum, an addendum will be issued to all RFP document holders. Proposals must be submitted based on the RFP as written, and as modified by Addenda.
- It was stressed that any comments/ exceptions to Exhibit 1, the Sample Agreement, must be provided in the Appendix section of the Proposal. Post-RFP comments/ exceptions to the Sample Agreement that are not set forth in a firm's proposal will not be considered or subject to any further negotiation consideration by PRT during the post-award Agreement finalization process.
- All Proposers must be registered in ebusiness, at <http://ebusiness.rideprt.org>, in order to be notified of PRT solicitations, to obtain copies of RFP's, the subsequent addenda and other related information, and to submit a Proposal in response to this RFP 26-02.
- Although RFP documents will also be available on PRT's website, PRT will only accept electronic proposal submittals through the ebusiness portal for this RFP, which requires vendor registration. Instructions to how to submit a proposal through PRT's eBusiness website can also be found in Exhibit 9 of the RFP.
- Mr. Schenk then gave an overview of the Scope of Services. The Scope of Services for this RFP is set forth under Section 4 of the RFP document issued by PRT.
- The anticipated Procurement Schedule for RFP is as follows:
 - Proposers' last day for submitting questions is **March 5, 2026**.
 - Proposals are due at PRT by 2:00 PM, **March 10, 2026**.
 - Interviews (if necessary) are tentatively scheduled for **March 31, 2026**.
 - The RFP is tentatively scheduled for approval at the **April 2026** PRT Board Meeting.

Meeting adjourned at 10:10 a.m.



Fred Buckner
Senior Contract Specialist
Professional Services

Attachments: RFP 26-02 Information Meeting Attendance Sheet; RFP 26-02 Questions and Responses #1-21; RFP 26-02 Addendum No. 1; RFP 26-02 Information Meeting Presentation Slides

cc: Project File

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Financial Audit and Pension Plan Audit Services
Request for Proposal No. 26-02

INFORMATION MEETING ATTENDANCE

SUBJECT: Financial Audit and Pension Plan Audit Services
Request for Proposal No. 26-02
DATE: February 25, 2026
TIME: 9:30 AM

Representative Name	Company	Phone No.	E-Mail Address	PRT/ PA UCP Certified DB
Fred Buckner	PRT		fbuckner@rideprt.org	
Peter Schenk	PRT		PSchenk@rideprt.org	
Keith Bayles	PRT		KBayles@rideprt.org	
Donminika Brown	PRT		DBrown@rideprt.org	
Kellie Kendall	PRT		KKendall@rideprt.org	
Tia Gunn	PRT		TGunn@rideprt.org	
Sean Trageser	PRT		STrageser@rideprt.org	
Renelda Colvin	PRT		RColvin@rideprt.org	
Lori Churilla	Allegheny County Controller's Office		lori.churilla@alleghenycounty.us	
Tom Walenchok	Baker Tilly	412-697-6487	thomas.walenchok@bakertilly.com	
Hollis Hanson-Pollock	Crowe LLP		hollis.hanson-pollock@crowe.com	
Brian Chruscial	Zelenkofske Axelrod LLC	412-367-7102	bchruscial@zallc.org	
Heather Brigham Tiffany	BerryDunn		heather.tiffany@berrydunn.com	
Dustin Starr	Maher Duessel		dstarr@md-cpas.com	
Leah Clair	BerryDunn		lclair@berrydunn.com	
Shelley DeWees	CliftonLarsonAllen		shelley.deweese@claconnect.com	
John Compton	Baker Tilly			
Nicolas Glorieux	Baker Tilly		Nicolas.Glorieux@bakertilly.com	

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Financial Audit and Pension Plan Audit Services
Request for Proposal No. 26-02

Questions and Responses #1-21

QUESTION #	QUESTION	RESPONSE
1.	Are you able to provide the fees paid for the financial statement and pension plan audit services for each of the past three years? Please indicate if there were any billings above contracted amounts for “out-of-scope” or additional services not contemplated at contract award.	<i>Year 1- \$102,447.26, Year 2- \$110,332.07, Year 3 \$110,500.00. No “out-of-scope” services at contract award.</i>
2.	Do you typically have adjusting journal entries as a result of the audits? If so, how many do you typically have?	<i>On average, there can be 10-15 adjusting entries annually.</i>
3.	What are the expectations for performance of the fieldwork for both the financial statement and pension plan audits? Any preference as to whether the work is performed remotely, on-site or a hybrid model?	<i>PRT would prefer a hybrid model for fieldwork. Audit Committee presentation is in-person.</i>
4.	Does management prepare the annual Management’s Discussion and Analysis section for the financial statement audits?	<i>PRT has historically prepared the Single Audit MD&A. PRT has not included an MD&A on the pension audits.</i>
5.	Does management prepare the financial statements and/or required supplementary information for the pension plan audits?	<i>PRT <u>does not</u> prepare the pension plan financial statements or required supplementary information. As mentioned at the Information meeting, PRT will provide the necessary source information for the pension audits.</i>
6.	What general ledger package does the Port Authority use?	<i>PRT utilizes Peoplesoft for its ERP system.</i>
7.	What is the overall timeline for the financial statement audit? When does the Port Authority prefer interim and fieldwork to be performed? When are draft reports due to management and the Board?	<i>Single Audit interim work should begin July 1st. Fieldwork should begin mid-August. Draft reports to management are needed the first week of October. The Board Audit Committee can occur in either November or as late as January.</i>
8.	On page 5, the RFP notes, “It is anticipated that the annual pension audits will commence in the April-May time frame and be completed by June 30th of each year.” We noticed the 2023 pension plan audited financial statements are dated December. Has the timing expectation changed or was there a delay in issuing the pension plan audits? If there was a delay, what was the cause?	<i>The commencement of the pension audits is April-May. Completion of the pension plan audits would be dependent on relation to its impact of incorporating any data into Single Audit or Valuations. Dating of the final pension audits could have been delayed due to management review, but not due to auditor performance.</i>
9.	Are the calendar year 2024 pension plan audits complete?	<i>Yes, we can add these to the secured file as well as the FY2025 Single Audit with State Schedules.</i>

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Request for Proposal No. 26-02

QUESTION #	QUESTION	RESPONSE
10.	When does PRT usually receive the actuarial reports and trust statements for the pension plan audits?	<i>The actuarial reports necessary to complete the pension audits are available in advance of the April-May Pension Audit commencement. Trust Statements are available by the end of January.</i>
11.	Have the incumbent auditors generally met the pre-determined deadlines for both the financial statement and pension plan audits?	<i>Yes, deadlines for both Single audits and Pension Audits have been met.</i>
12.	Has the Uniform Guidance audit historically been completed at the same time as the financial statement audit?	<i>Yes.</i>
13.	Does PRT anticipate any grant closeouts for completed capital projects for FY26-FY28, as mentioned in #5 of the Scope of Services section on page 27? Should these costs be included in the fixed fee or can a separate cost be provided for years in which these activities are required?	<i>Currently, the auditor will not be responsible for reviewing or preparing any supplementary schedules of State capital grant closeouts under current Pennsylvania Department of Transportation's guidelines. The selected auditor would be expected to perform normal testing of State capital grant expenditures.</i>
14.	Does PRT anticipate any needs for special studies or reports for fiscal year 2026, as described in #6 of the Scope of Services section on page 27?	<i>Not at this time.</i>
15.	Is the incumbent firm allowed to propose?	<i>Yes.</i>
16.	Is there anything about your current audit process that you would like changed in the future?	<i>No, but PRT is always open to process improvements</i>
17.	Will PRT accept the involvement of an auditor's specialist utilized by the auditor to assist in investment valuation testing for the pension plan audits?	<i>PRT would not be against the use of such a specialist if the selected vendor feels there is value added.</i>
18.	Have there been any disagreements between management and your independent auditor during the prior three engagements?	<i>No</i>
19.	What are the three biggest challenges affecting PRT?	<i>1) Future, Sustainable Funding 2) Restoring ridership to pre-pandemic levels 3) containing benefits costs.</i>
20.	Are there any significant organizational, governance, or administrative changes in PRT that will have an impact on the audit process moving forward?	<i>PRT is not aware of any at this time.</i>
21.	Does PRT consider either the financial statement or pension plan audit services to be parts of federally funded projects or is there a DBE goal in place for this engagement? If there is a DBE goal, is it up to 15% of the contract? Is there a minimum DBE requirement?	<i>There is no minimum DBE requirement and there are no federal funds being utilized for this project.</i>

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Request for Proposal No. 26-02

ADDENDUM NO. 1

The following Addendum to the above Request for Proposal (RFP) is hereby made a part thereof, and the Proposer shall acknowledge receipt and inclusion of said Addendum in its Proposal Letter of Transmittal (Section 2.1.1(1)(e) of the RFP).

<u>Section of RFP to be Changed</u>	<u>Description of Change</u>
Section 4.1.5	RFP 26-02 Section 4.1.5 is amended with the following language: Currently the auditor will not be responsible for reviewing or preparing any supplementary schedules of State capital grant closeouts under current Pennsylvania Department of Transportation's guidelines. The selected auditor would be expected to perform normal testing of State capital grant expenditures.



Pittsburgh Regional Transit



INFORMATIONAL MEETING

REQUEST FOR PROPOSALS NO. 26-02

FEBRUARY 25, 2026

INTRODUCTIONS

- **Fred Buckner**
 - Senior Contract Specialist
 - Provide an eBusiness Overview
 - Provide a general overview of the RFP requirements
- **Renelda Colvin**
 - Contract Compliance Specialist
 - Will address the DB requirements
- **Peter Schenk**
 - Controller (Project Manager for this RFP)
 - Will provide an overview of scope of services

Please make sure your virtual microphones and phone are on mute throughout the duration of the meeting.

If you are joining through Teams Virtual platform, all questions should be entered in the Chat Box.

If you are joining by phone, you need to announce yourself and the company you represent before asking your question.

ALL questions must also be submitted in writing to:

fbuckner@rideprt.org

VIRTUAL AND PHONE ETIQUETTE

eBusiness Overview



REGISTER NOW

eBusiness Registration

- You **must** be registered:
 - To receive notifications for this RFP
 - To submit a proposal for this RFP
- Registration estimated time is 5-10 minutes to complete
- Recommend registering when there is time to complete

Already Registered?



- Great! Please check your credentials!
- Don't remember your User ID or Password?
- Getting an error message?

Contact **Fred Buckner** at:

fbuckner@rideprt.org



Do not wait!!!!!!!!!!

- Navigating eBusiness takes time
- Uploading documents takes time
- Submitting the proposal takes time
- You may get an error message
- The system will kick you out when the event closes
- **PLEASE ALLOW YOURSELF ENOUGH TIME**



Web browser compatibility

P Pittsburgh
R Regional
T Transit

- Recommended Browsers:
 - Chrome
 - FireFox
 - Edge
 - Safari
- Not mobile friendly

User ID

Password

Sign In

New Bidder Help
Bidder's Quick Guide to eBusiness (PDF)

Click the link below to register as a new Bidder:

Bidder Registration
Change Password

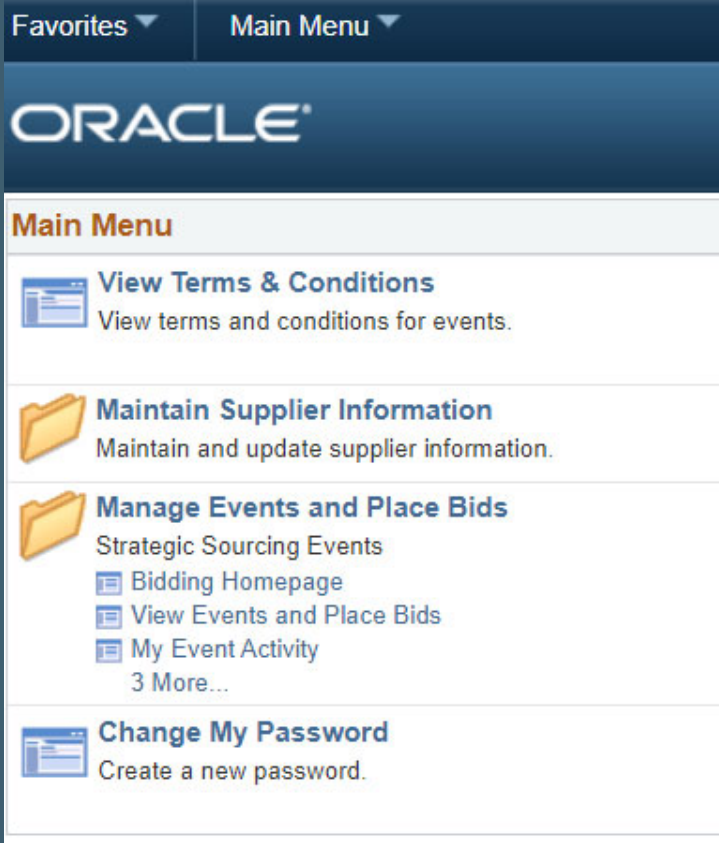
Ebusiness portal overview

- Login
- Download User Guide
- Register
- Reset Password

Ebusiness Portal Overview

P Pittsburgh
R Regional
T Transit

View Events and Place Bids



The screenshot shows the Oracle Ebusiness Portal interface. At the top, there are two tabs: 'Favorites' and 'Main Menu'. Below the tabs is the Oracle logo. The 'Main Menu' section is expanded, showing a list of options. The first option is 'View Terms & Conditions' with a sub-description 'View terms and conditions for events.' The second option is 'Maintain Supplier Information' with a sub-description 'Maintain and update supplier information.' The third option is 'Manage Events and Place Bids', which is highlighted with a folder icon. It includes a sub-description 'Strategic Sourcing Events' and a list of links: 'Bidding Homepage', 'View Events and Place Bids', 'My Event Activity', and '3 More...'. The fourth option is 'Change My Password' with a sub-description 'Create a new password.'

Favorites ▾ Main Menu ▾

ORACLE

Main Menu

-  **View Terms & Conditions**
View terms and conditions for events.
-  **Maintain Supplier Information**
Maintain and update supplier information.
-  **Manage Events and Place Bids**
Strategic Sourcing Events
 -  Bidding Homepage
 -  View Events and Place Bids
 -  My Event Activity
 - 3 More...
-  **Change My Password**
Create a new password.

Ebusiness Portal Overview

- This page takes time to load!
- Displays all Sourcing Events
 - Enter Event ID
 - Search
 - Click Event ID

View Events and Place Bids

Enter search criteria to locate an event for viewing or placing bids.

Search Criteria

Use Saved Search

Event ID -

Event Name

Event Type

Event Status

Results Should

- ☒ Sell Event
- ☒ Purchase
- ☒ Request

☒ Include Declined Invitations?

Search

Clear Criteria

[Manage Saved Searches](#)

[Save Search Criteria](#)

Search Results



Event ID	Event Name	Format
OPERN-RFP 20-08	RFP 20-08 Employee Benefits	Sell

Ebusiness Portal Overview



Event Details

Welcome, Creative Cupcakes
User: cupcake

[Information On Inquiry Options](#)

Bidding Shortcuts:

[View Event Activity](#)

[Accept Invitation](#)

[Decline Invitation](#)

[View/Bid on Event](#)

Event Name RFP 20-08 Employee Benefits
Event ID OPERN-RFP 20-08
Event Format/Type Sell Event RFX
Event Round 1
Event Version 1
Event Start Date 08/17/2020 12:21PM EDT
Event End Date: 09/17/2020 02:00 PM EDT

Event Description:

RFP 20-08 Employee Benefits Consulting Services

Contact Catherine A Terrill

Phone 412/566-5188

Email: cterrill@portauthority.org

Online Discussion: [Discuss Event in Forum](#)

Live Chat Help:

Payment Terms: 60 DAYS

My Bids: 0

Edits to Submitted Bids Allowed

Multiple Bids Allowed

- Contact Info
- Discuss Event in Forum is disabled
- Please contact the Contract Specialist directly
- Click View/Bid on Event

Ebusiness Portal Overview

- Answer General Event Questions
- Provides Ideal Answer



Step 1: Answer General Event Questions

The event administrator requests your response to questions not specific to any specific item.

General Event Questions	1
Required Questions	1
Questions Responded To	0

[Hide Event Questions](#)

Event Questions

★ Bid Required 🚩★ Ideal Response Required

General Questions

1 of 1



Did you upload an electronic copy of your proposal as per the RFP requirements?

Response

[Add Comments or Attachments](#)

Ideal Yes

Ebusiness Portal Overview



- Leave Line Item information blank
- Event Comments and Attachments

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event 1
Lines Responded To 0
Your Total Line Pricing 0.0100 USD

[Hide Line Detail](#)

★ Bid Required [Line Comments/Files](#)

Lines

Line	Description	Manufacturer ID	Manufacturer's Item ID	Unit	Requested Quantity	Your Bid Quantity	No Bid	Your Total Bid Price	Manufacturer	Manufacturer Part No
1	See attached documents			EA	1.0000	1.0000	☐	0.0100 USD		

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

Ebusiness Portal Overview

- Download RFP Documents
- Upload Proposal

Event Comments and Attachments

F10_RFP_20-08_Exhibit_7_General_Requirements.pdf	Exhibit 7	View
F11_RFP_20-08_Exhibit_8_Rating_sheet.pdf	Exhibit 8	View
F12_RFP_20-08_Exhibit_9_Submitting_Prop_via_Ebusiness.pdf	Exhibit 9	View
F13_RFP_20-08_Exhibit_10_Authority_CP_and_PP.pdf	Exhibit 10	View
RFP_20-08_Employee_Benefits.pdf	Event Details	View
RFP_20-08_Employee_Benefits.pdf	Event Details	View

Add New Attachments ⓘ

1-1 of 1

Attached File	Attachment Description	Upload	View		
		Upload	View	Add New Attachments	Delete

Comments

Add New Comments ⓘ

[OK](#) [Cancel](#)

Ebusiness Portal Overview

- Enter Attachment Description
- Click Add New Attachment for each additional document
- Click Ok

Add New Attachments ?

 1-2 of 2

Attached File	Attachment Description	Upload	View		
RFP_20-08_Employee_Benefits_Consulting_Svcs.pdf	Proposal	Upload	View	Add New Attachments	Delete
		Upload	View	Add New Attachments	Delete

Comments

Add New Comments ?



Ebusiness Portal Overview

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines Administrator.

Lines in This Event 1
Lines Responded To 0
Your Total Line Pricing 0.0100 USD

[Hide Line Detail](#)

★ Bid Required

[Line Comments/Files](#)

Lines

 				
Line	Description	Manufacturer ID	Manufacturer's Item ID	Unit
1	See attached documents			EA

[Event Comments and Attachments](#)

At any point in the bid response process you may save an in-progress bid and resume completion

Submit Bid

Save for Later

Save for Later vs. Submit
Bid

Ebusiness Portal Overview

Bid Confirmation

Your bid has been successfully submitted.

Bid ID	1	Bid Date	07/10/2020 2:06:44PM EDT
Event ID	RFP20-04	RFP20-04 General Marketing Services	
Event Format	Sell Event	Round	1
		Version	1
Start Date	06/30/2020 8:49AM EDT	End Date	07/30/2020 02:00 PM EDT
Your Total Price 0.01 USD			

OK

Copy Bid

- Click OK
- Done!
- You will receive an email confirmation that the proposal was submitted

PROACTIVE VS REACTIVE



Additional ebusiness information

- Carefully select categories related to your type of business
- STRONGLY encourage to register multiple personnel
- Be proactive in updating eBusiness registration information
- Be proactive in checking PRT's website



eBusiness Support

- Please contact the following for eBusiness questions:

Fred Buckner at
fbuckner@rideprt.org

General Overview of RFP Requirements

GENERAL INFORMATION

- **PRT is requesting proposals for Financial Audit and Pension Plan Audit Services:**
- **1.) Financial**
 - a.) Financial – Perform annual single audit and financial audits
 - b.) Review and certify PRT’s statistical data required for the annual FTA NTD reports.
 - c.) Reports required by the FTA, Commonwealth of Pennsylvania, County of Allegheny or other agencies.
 - d.) Supplementary schedules
 - e.) Special studies and reports authorized and/or required by PRT during the term of the agreement.
- **2.) Pension Plan – perform an annual audit of each of the PRT’s three pension plans.**

GENERAL INFORMATION

- It is the intent to enter into Agreements with a single contractor
- **Term of the Agreement:**
3-year period with the option to extend up to an additional 2 years.
- **Termination for Convenience:** As a public agency that receives federal funds, Termination for Convenience is a non-negotiable Agreement term; any attempts to strike or modify this term shall be ruled as non-responsive. Please keep this in mind when preparing your proposal, particularly your Summary of Costs.

GENERAL INFORMATION

- **Proposals must be submitted electronically through PRT's eBusiness system**
 - By 2:00 p.m., prevailing time, March 10, 2026
 - Instructions have been provided in Exhibit 9 of the RFP
- **Scope-related Questions must be received submitted via email to fbuckner@rideprt.org by March 5, 2026**
 - Please note that Exhibit 1 in the RFP is the Sample Agreement that PRT will utilize to enter into an Agreement with the successful Proposer. Please review and, if necessary, provide any comments in your proposal. **Redlines and Deviations will not be accepted if not included in your proposal.**

SECTION 2.1.2

DB/DBE SUBCONTRACTOR PARTICIPATION

- Inclusion of Diverse Business (DB) participation will be accounted for in the proposal evaluation process.
- Certified DBs can be found on the Pennsylvania Department of General Services (DGS) Small Diverse Business Program website
 - <https://dgs.internet.state.pa.us/suppliersearch>
- If assistance is required in obtaining DBs:

	Renelda Colvin	Sue Broadus
PHONE	(412) 566-5383	(412) 566-5257
EMAIL	rcolvin@rideprt.org	

SECTION 2.0- PROPOSAL REQUIREMENTS

- **Structure of Proposal**
 - Cover
 - Letter of Transmittal (Include items identified in Section 2.1.1)
 - Section 1 – Overview of Proposal
 - Section 2 – Experience Record
 - Section 3 – Project Work Plan
 - Section 4 – Project Organization and Management Plan
 - Section 5 – Summary of Costs
 - Appendix Information
 - Include any comments on Exhibit 1, and Exhibits 2 through 6 are to be submitted as part of the appendix of your proposal
- **Shall be no more than 50 pages**
 - Appendix information is in addition to page limit
 - Font Size for all material shall not be less than 10 pt.

SECTION 2.2

OVERVIEW OF PROPOSER

SECTION 1 OF THE PROPOSAL

- Include a description of the Proposer and its subcontractors
- Contractor will be required to perform a minimum of 85% of the work
 - A maximum of 15% may be subcontracted
 - Include percentage of work to be performed by the Proposer and its proposed Subcontractors

SECTION 2.3 EXPERIENCE RECORD *SECTION 2 OF THE PROPOSAL*



- Please provide 3 references
- Provide relevant project experience of Proposer and any proposed Subcontractors
- Status (ongoing or completed) and Time Frame
- Responsibilities for the Project
- Project Manager and Staff for each identified project
- Contract Value
- Client Contact and contact information. References that cannot be either confirmed or reviewed with your client are not beneficial.

SECTION 2.4

PROJECT WORK PLAN

SECTION 3 OF THE PROPOSAL

- **Demonstrate understanding and approach**
 - **DO NOT REINTERATE THE RFP SCOPE OF SERVICES**
- **Identify each task and names of individuals or disciplines**
 - Include Subcontractors

SECTION 2.5

PROJECT ORGANIZATION AND MGMT. PLAN

SECTION 4 OF THE PROPOSAL



- **Description, roles, and responsibilities for Contract Services**
 - Project Manager
 - Key Personnel
 - Subcontractors
- **Provide Organizational Chart**
 - Include individual's name
 - Include company
 - Include proposed role

SECTION 2.6

SUMMARY OF COSTS

SECTION 5 OF THE PROPOSAL



- Sample forms provided in Exhibit 6A-6B
- A separate Summary of Costs form is required for each subcontractor.

SECTION 2.7

APPENDIX INFORMATION

APPENDIX SECTION OF THE PROPOSAL



- **Financial Information**
 - Two (2) most recent financial years
 - Publicly held firms shall include in the Proposal
 - Privately held firm may defer until notice of being short-listed
- **Certifications**
 - Exhibit 2 [Certification of Debarment]
 - Exhibit 3 [Certification of Lobbying and Disclosure Form]
 - Prime Contractor submission only. Subcontractors prior to award of Agreement.
- **Proposer Subcontractor/Data Form**
 - Exhibit 4
- **Resumes**
 - Exhibit 5
 - Not to exceed 20 pages

SECTION 2.7

APPENDIX INFORMATION

APPENDIX SECTION OF THE PROPOSAL



- **Key Personnel Letter(s)**
 - Signed letter by Proposer and any of its proposed subcontractors
- **Affirmative Action and Equal Opportunity Policy Statement**
 - Signed and dated
 - **DO NOT SUBMIT ACTUAL POLICY**
- **Insurance Coverage Statement**
 - Requirements in Exhibit 1, Sample Agreement
 - **DO NOT SUBMIT CERTIFICATE OF INSURANCE AT THIS TIME**

SECTION 3.0

PROPOSAL SELECTION PROCESS

EXHIBIT 7 – GENERAL REQUIREMENTS CHECKLIST

RFP Reference Section	Rating Criteria (Reference – Part II)	Yes	No
2.1.1.1(a)	Name, Title, Address, Phone/Fax number(s) and e-mail address of Individual(s) Authorized to Bind Proposer/Signature		
2.1.1.1(b)	Name, Title, Address, Phone number and e-mail address of Individual to be Contacted for Interview		
2.1.1.1(c)	Address and Legal Form of Proposer		
2.1.1.1 (d)	Proposal in effect for 180 days		
2.1.1.1(e)	Acknowledging receipt of addendum		
2.1.1.1(f)	Proposer Confidentiality Statement		
2.1.1(2)(c)	Proposal contains no more than 50 pages		
2.2.1	Description of Proposer		
2.2.3	Contractor to Perform eighty-five (85%) Percent of the Work		
2.2.3	Subcontractor Utilization/Percentage of Work		
2.2.5	Personnel and Operations Policies		
2.7.1	Financial Information (<i>Publicly Held Firms Only</i>)		
2.7.2	Certification of Proposer Regarding Debarment (Exhibit 2)		
2.7.3	Certification Regarding Lobbying (Exhibit 3)		
2.7.4	Proposer/Subcontractor Data Form (Exhibit 4)		
2.7.6 & 2.5.3	Guarantee of Personnel Assignment		
2.7.7	Affirmative Action/Equal Opportunity Policy		
2.7.8	Statement of Insurance Availability		

SECTION 3.0

PROPOSAL SELECTION PROCESS

EXHIBIT 8 – EVALUATION RATING CRITERIA

P Pittsburgh
R Regional
T Transit

RFP REF SECTION	RATING CRITERIA	WEIGHTED MULTIPLIER
2.1.2	DB Utilization	4
2.3	Experience Record	7
2.4	Project Work Plan	4
2.5	Project Organization & Management Plan	4
2.5.2/2.5.3	Project Manager	7
2.5.2	Staff Resumes	6
2.6	Summary of Costs	8
	TOTAL WEIGHTED SCORE:	40

TENTATIVE DATES

(DATES ARE SUBJECT TO CHANGE AT THE DISCRETION OF PRT)

P Pittsburgh
R Regional
T Transit

- | | |
|--|------------------------|
| • Last day for questions | March 5, 2026 |
| • Proposal due at or before 2:00pm | March 10, 2026 |
| • Interviews (if necessary) | March 31, 2026 |
| • Presentation for Board Consideration | April 2026 (tentative) |
| • Commencement of Services | TBD |

SECTION 4 SCOPE OF SERVICES

Overview of the Scope of Services

Presented by

Peter Schenk

QUESTIONS AND ANSWER SESSION

All questions must be submitted
in writing via email to
fbuckner@rideprt.org

P Pittsburgh
R Regional
T Transit

