PITTSBURGH REGIONAL TRANSIT

TRANSMITTAL MEMORANDUM No. 1

TO: All Holders of Request for Proposal No. 26-15

SUBJECT: Financial Advisory Services
Request for Proposal No. 26-15

DATE: June 26, 2026

Please find enclosed the following:

- RFP 26-15 Information Meeting Agenda
- RFP 26-15 Meeting Minutes dated June 17, 2026
- RFP 26-15 Information Meeting Attendance
- RFP 26-15 Question and Response 1
- RFP 26-15 Information Meeting Presentation Slides
- RFP 26-15 Potential DBE / DB List

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:

Pittsburgh Regional Transit
Procurement Department
345 Sixth Avenue, Third Floor
Pittsburgh, PA 15222-2527

Attention: John Young

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

Information Meeting Agenda
Request for Proposal No. 26-15

Financial Advisory Services

DATE: Wednesday, June 17, 2026

TIME: 9:30 A.M.

SEQUENCE:

A. Introduction

B. Telephone Contacts for Proposer Questions

Procedural, eBusiness Registration:

John Young – PRT (412) 566-5216

Diverse Business Enterprises Questions:

Sue Broadus – PRT (412) 566-5257

Questions Relating to Schedule of Activities and Technical Questions:

Peter Schenk – PRT (412) 566-5244

Must be in writing and must be submitted by mail, e-mail or facsimile to:

Pittsburgh Regional Transit of Allegheny County
345 Sixth Avenue, Third Floor Pittsburgh, PA 15222-2527
Fax: (412) 566-5359
Attn: Mr. John Young
E-Mail: jyoung@rideprt.org

C. Review RFP Document and Proposal Requirements

D. Overview of Scope of Services

E. Questions and Answers

F. Wrap-Up

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

Financial Advisory Services

Request for Proposal No. 26-15
June 17, 2026
Information Meeting Minutes

The Information Meeting for the above-referenced Request for Proposal (RFP) was held on June 17, 2026, at 9:30 a.m. A copy of the attendance sheet of attendees is attached.

John Young, Professional Services Contract Specialist, opened the conference for PRT. The other PRT attendees making presentations were: Keith Bayles, Manager of Procurement; Sue Broadus, Director of Small Business Engagement; and Peter Schenk, Controller. No interested parties were in attendance, so the meeting was adjourned at 9:40 AM.

Mr. Young planned to discuss the following issues:

- Electronic proposals must be both received and timestamped through PRT's eBusiness website at or before 2:00 p.m., prevailing time, July 09, 2026, at http://http://ebusiness.ridePRT.org. Proposals received or timestamped through PRT's Ebusiness website 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 John Young at (412) 566-5216. Questions concerning clarifications should be submitted in writing to the attention of Mr. Young of the Procurement Department and may be faxed to (412) 566-5359 or e-mailed to jyoung@ridePRT.org. PRT will not respond to questions received, other than procedural, after June 29, 2026.

- PRT's Diverse Business program requires that DBs have the maximum opportunity to participate in the performance of contracts and subcontracts.

    - PRT is aware of the United States Department of Transportation's Interim Final Rule, effective October 3, 2025, regarding the removal of Disadvantaged Business Enterprise requirements from federally funded projects. However, as RFP 26-15 is not a federally funded project, the Commonwealth of Pennsylvania's Diverse Business (DB) Program requirements as stated in Section 303 of Title 74 of the PA Consolidated Statutes to "…seek to maximize participation by diverse businesses" remain in effect 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.

    - While there is no established goal on this specific RFP, proposers are required to identify subcontracting opportunities for the utilization of DB firms who are properly certified. If you are a DB proposer, you will still be required to identify subcontracting opportunities for the utilization of DBs.

- 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:

  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
  5. Pennsylvania Unified Certification Program

  While the Pennsylvania DB law remains in effect, the practical impact of the IFR removing the certified DBE status of all previously state UCP-certified DBE firms is that PRT Office of Small Business Engagement until completion of the reevaluation process, personnel cannot consider subcontractors or subconsultants proposed by prime contractors or consultants as "diverse businesses" if the only certification they hold is from the PA UCP. Rather, and at least temporarily, only a certification from one of the other four identified Pennsylvania certifying organizations will meet the "diverse business" definition/standard under the Pennsylvania DB law, unless the firm can provide documentation of completion of the reevaluation process.

- 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:

  1. DB firm name, contact information, contact person, date of contact, and type of contact (email, phone call)
  2. Description of the scope of work that was provided to the DB along with the date it was provided
  3. Documentation of the response received from the DB
  4. Dates of follow-up discussions
  5. Explanation for why a commitment with a DB was not made (if applicable)
  6. If pricing is a factor for the selection of a 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 do not constitute a good faith effort:

1. Sending mass emails
2. 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
3. Failure to contract with DBs because the bidder prefers to self-perform the scope of work is not legitimate Good Faith Efforts.
4. A promise to use DBs after contract award is not legitimate Good Faith Efforts.
5. Rejection of a DB based on political and social affiliations are not legitimate Good Faith Efforts.
6. Rejection of a DB based on union status (Union shop or non-union) are not legitimate Good Faith Efforts.

- If assistance is required with identifying DBs to utilize, how to become a certified DB, or there are any other questions relating to DB participation, proposers should contact Sue Broadus at 412-566-5257. She 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 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 make necessary 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 would have been 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.

- Mr. Young planned to provide an overview of the ebusiness procedures for registration and submitting a proposal. 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 26-15.

  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 on how to submit a proposal through PRT's eBusiness website can also be found in Exhibit 9 of the RFP.

- Mr. Young planned to provide a general overview of the scope of services that PRT is seeking via this RFP. Section 4.0 of the RFP on pages 26 through 28 of the RFP documents contains that scope of services.

- After generally discussing the scope of services for the RFP, Mr. Schenk planned to advise the potential proposers on the Scope of Services.

- The anticipated Procurement Schedules for both RFP is as follows:

    - Proposers' last day for submitting questions is June 29, 2026.
    - Proposals are due at the PRT by 2:00 p.m. July 09, 2026.
    - Interviews are tentatively scheduled for August 05, 2026 & August 06, 2026.
    - The RFP is tentatively scheduled for approval at the September 2026 Board of Directors Meeting.

- Following the overview of the Scope of Services, the floor was planned to be open for general discussion and any questions from the attendees; however, PRT did receive one (1) question prior to the Information Meeting.

- QUESTION #1: Does a respondent have to have capabilities in every component of the scope of services in section 4.0? Given that work orders will be released with more defined scope, I'm wonder if for this RFP response we could just respond to some sections of the "financial and strategic planning services" and not respond to the "debt investment management advisory services." Or is the client looking for one team to have all of the capabilities described in the scope?

- RESPONSE #1: PRT is interested in contracting with (1) one firm capable of providing all the various components of the RFP.

The conference was adjourned at 9:40 a.m. EST.

John Young
Professional Services Contract Specialist

Attachments: RFP 26-15 Informational Meeting Attendance; RFP 26-15 Question and Response 1; RFP 26-15 Information Meeting Slides; RFP 26-15 Potential DBE / DB List

cc: Project File

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

INFORMATION MEETING ATTENDANCE

SUBJECT: RFP 26-15 FINANCIAL ADVISORY SERVICES

DATE: June 17, 2026

TIME: 9:30 AM

Representative Name	Company	Mailing Address	Phone No.	E-Mail Address	PRT/ PA UCP Certified DBE / DB
Kieth Bayles	PRT	345 Sixth Avenue, Pittsburgh, PA 15222-2527	412-566-5434	kbayles@rideprt.org	
Sue Broadus	PRT	345 Sixth Avenue, Pittsburgh, PA 15222-2527	412-566-5257	sbroadus@rideprt.org	
Peter Schenk	PRT	345 Sixth Avenue, Pittsburgh, PA 15222-2527	412-566-5244	pschenk@rideprt.org	
John Young	PRT	345 Sixth Avenue, Pittsburgh, PA 15222-2527	412-566-5216	jyoung@rideprt.org	

PITTSBURGH REGIONAL TRANSIT

Financial Advisory Services
Request for Proposal No. 26-15
Question and Response 1
Transmittal Memorandum #1

Below are all questions and answers received pertaining to RFP No. 26-15 (Question 1).

QUESTION #	QUESTION	RESPONSE
1	Does a respondent have to have capabilities in every component of the scope of services in section 4.0? Given that work orders will be released with more defined scope, I'm wonder if for this RFP response we could just respond to some sections of the "financial and strategic planning services" and not respond to the "debt investment management advisory services." Or is the client looking for one team to have all of the capabilities described in the scope?	**PRT is interested in contracting with (1) one firm capable of providing <u>all</u> the various components of the RFP.**

John Young
Professional Services Contract Specialist


PRT
Pittsburgh Regional Transit

INFORMATION MEETING
REQUEST FOR PROPOSALS NO. 26-15

FINANCIAL ADVISORY SERVICES

June 17, 2026

INTRODUCTIONS

Pittsburgh Regional Transit

- **John Young**
  - Professional Services Contract Specialist
  - Provide an eBusiness Overview
  - Provide a general overview of the RFP requirements

- **Sue Broadus**
  - Director of Small Business Engagement
  - Will address the DBE / DB requirements

- **Peter Schenk**
  - Controller (Project Manager for this RFP)
  - Will provide an overview of Scope of Services

VIRTUAL AND PHONE ETIQUETTE

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:

Jyoung@rideprt.org

Pittsburgh Regional Transit

Pittsburgh Regional Transit

eBusiness Overview



Pittsburgh Regional Transit

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?

Pittsburgh Regional Transit

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

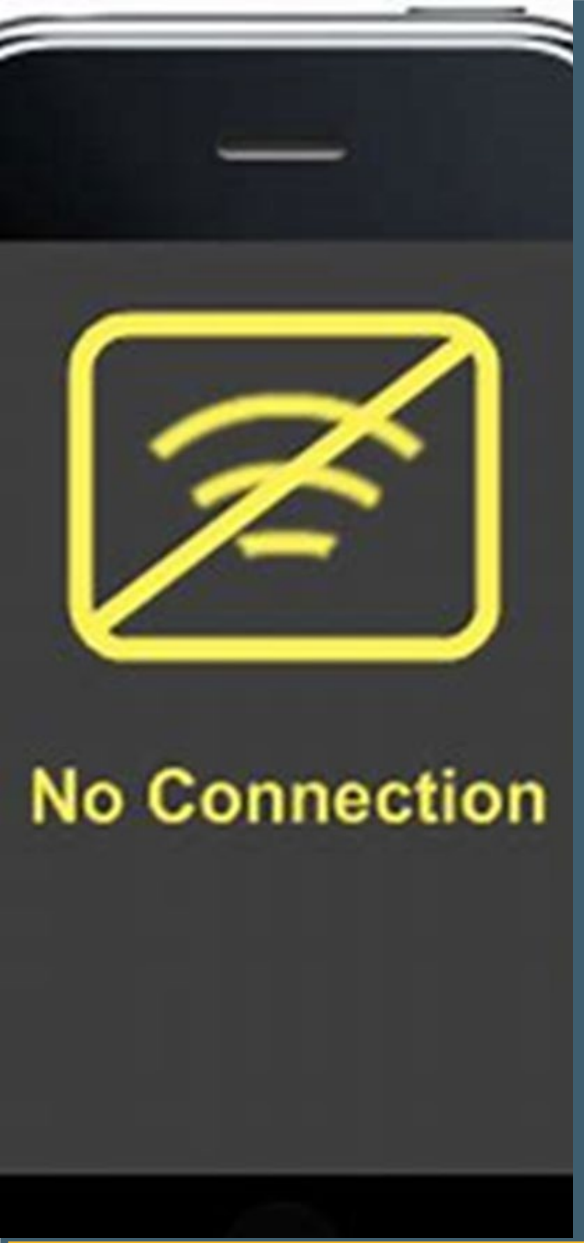
Contact **John Young** at:

Jyoung@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

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



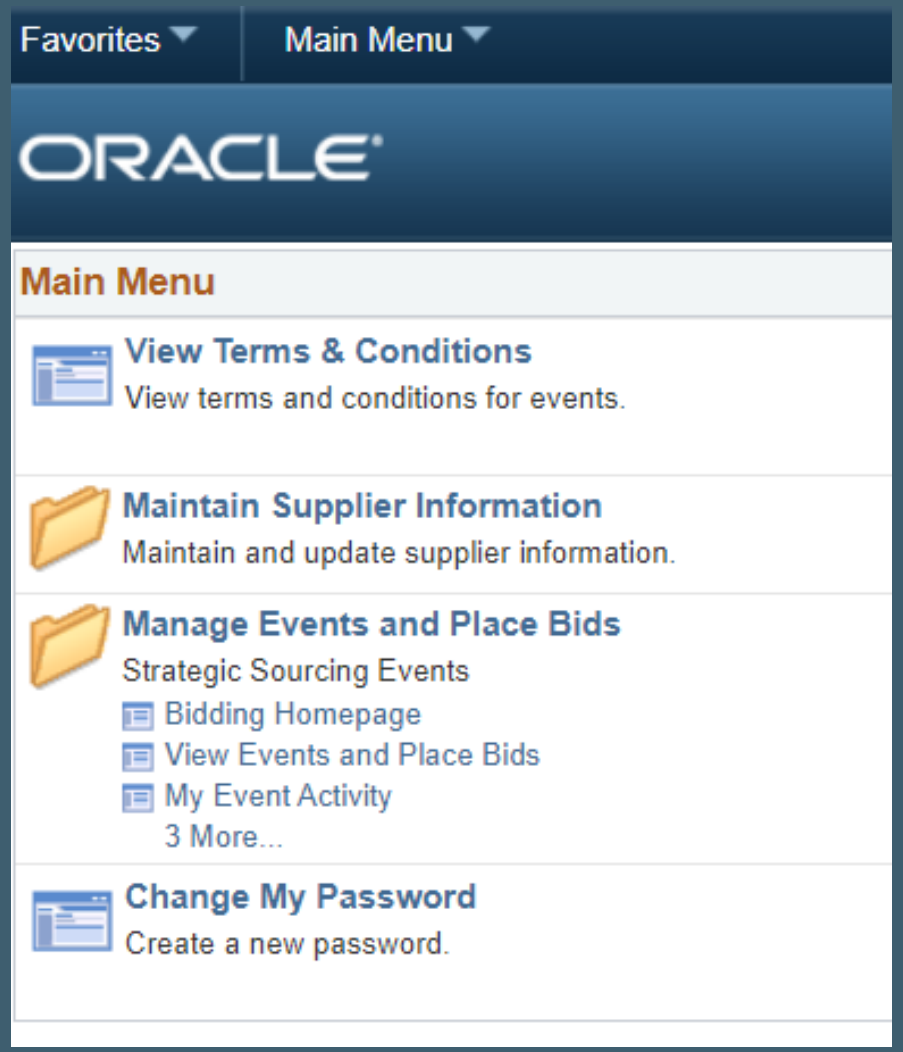
Ebusiness portal overview

- Login
- Download User Guide
- Register
- Reset Password

Ebusiness Portal Overview

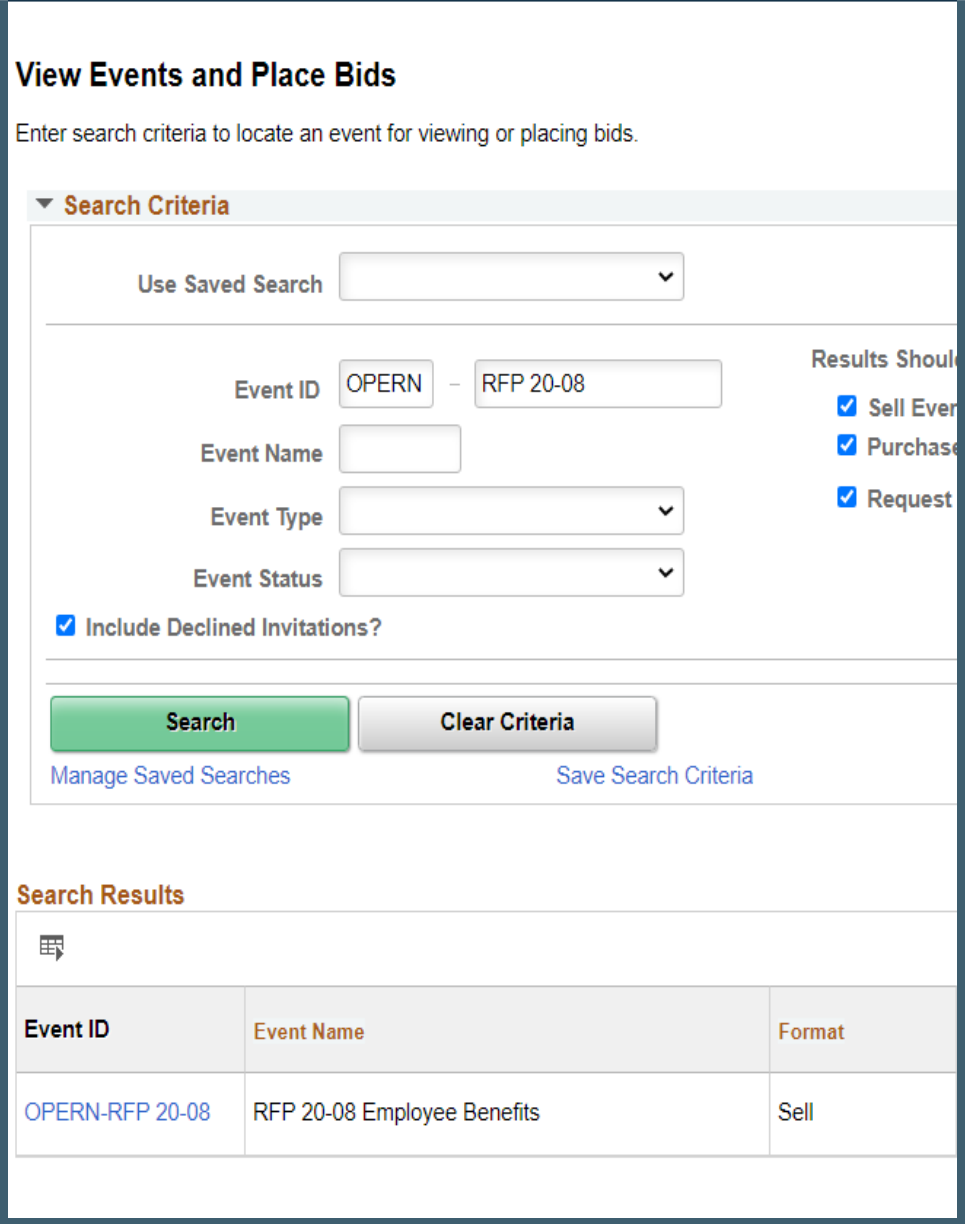
Pittsburgh Regional Transit

View Events and Place Bids



Ebusiness Portal Overview

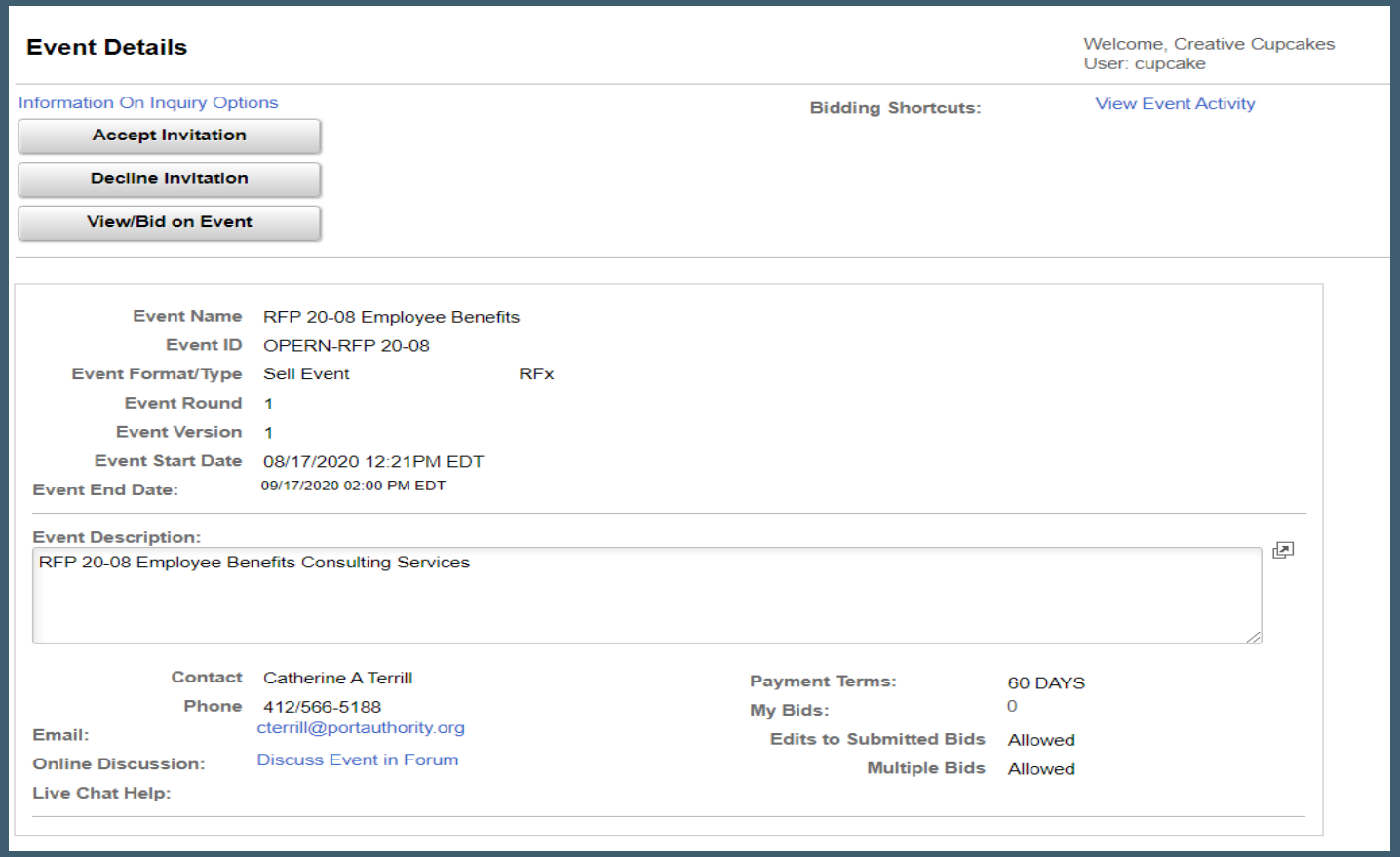
- **This page takes time to load!**
  - Displays all Sourcing Events
    - Enter Event ID
      - Search
      - Click Event ID



Pittsburgh Regional Transit

Ebusiness Portal Overview

Pittsburgh Regional Transit

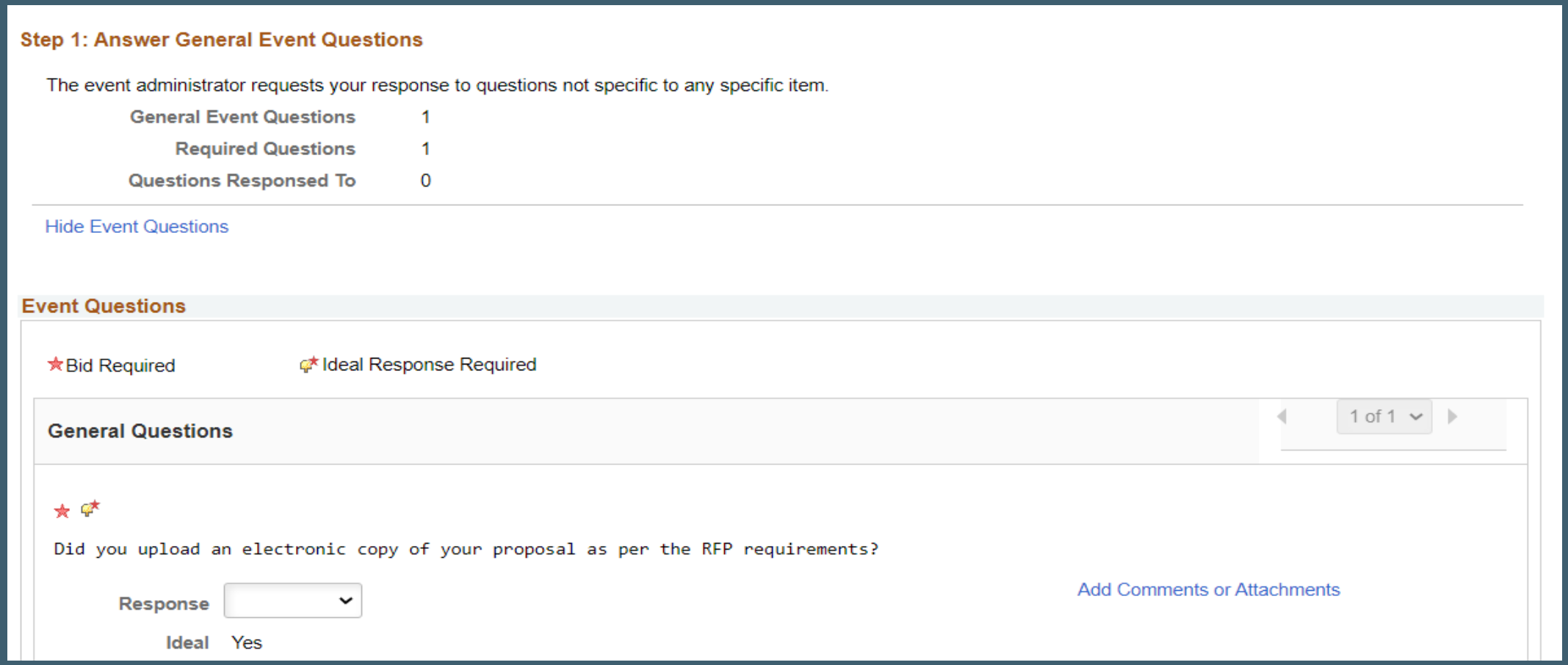


- Contact Info
- Discuss Event in Forum is disabled
- Please contact the Contract Specialist directly
- Click View/Bid on Event

Ebusiness Portal Overview

- Answer General Event Questions
- Provides Ideal Answer

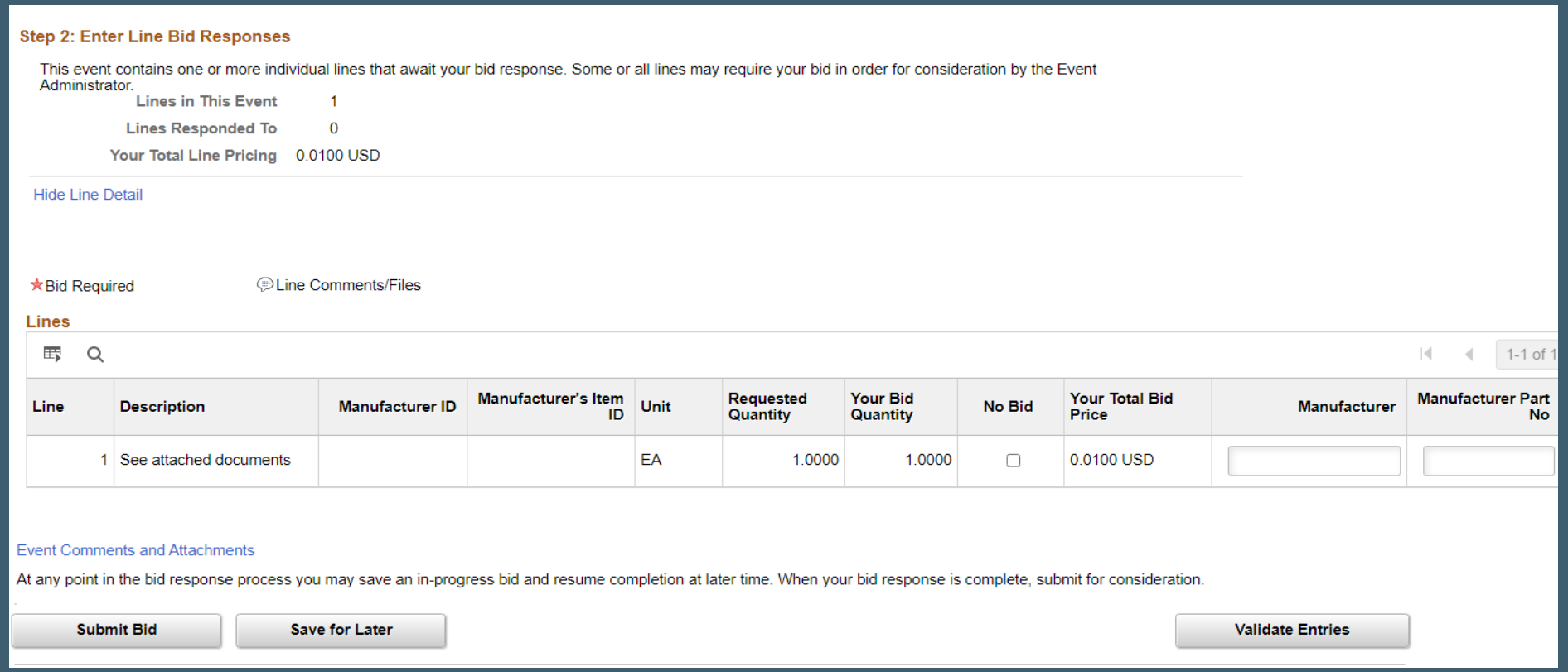
Pittsburgh Regional Transit



Ebusiness Portal Overview

- Leave Line Item information blank
- Event Comments and Attachments

Pittsburgh Regional Transit



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

1-1 of 1

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		

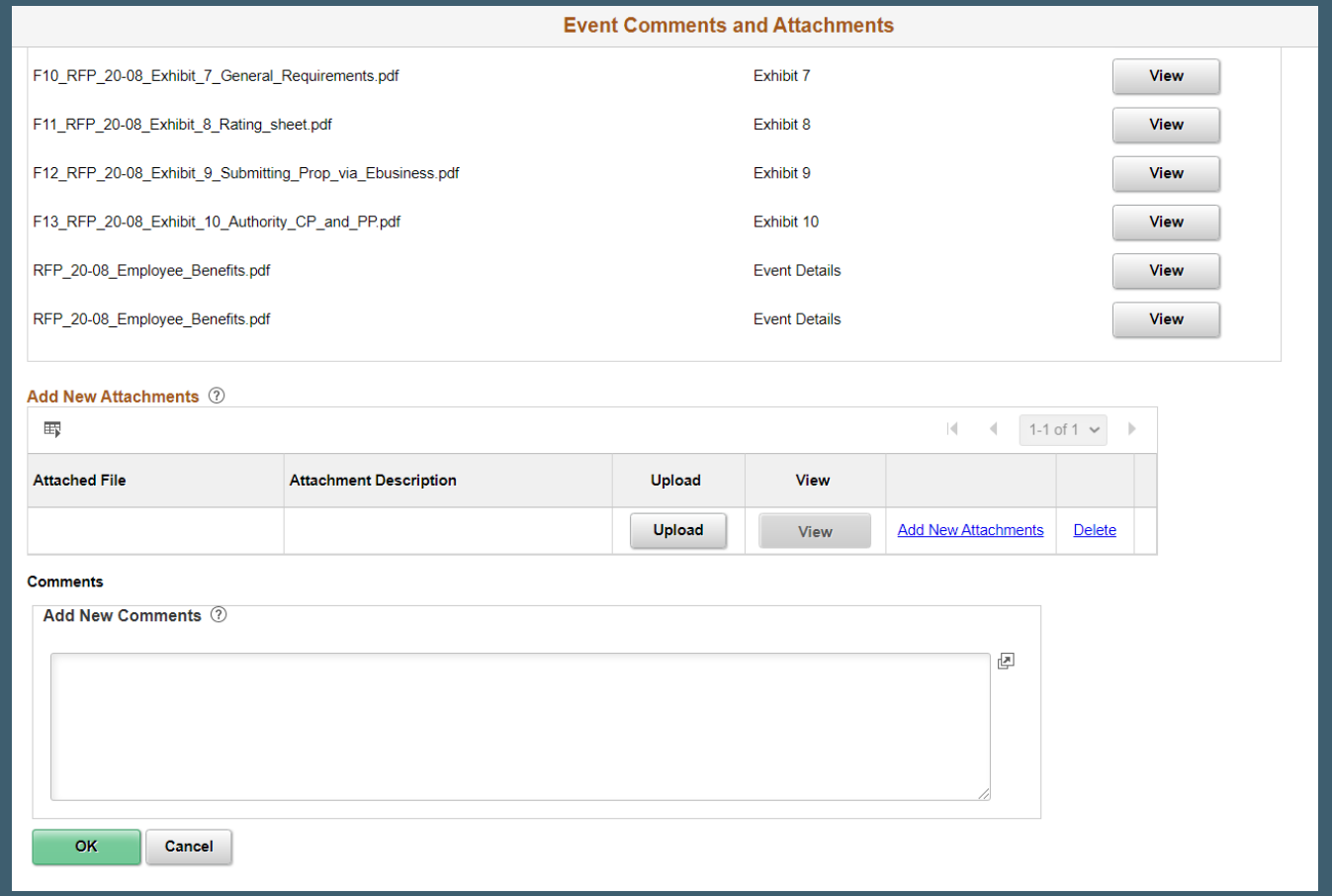
Event Comments and Attachments

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.

Submit Bid Save for Later Validate Entries

Ebusiness Portal Overview

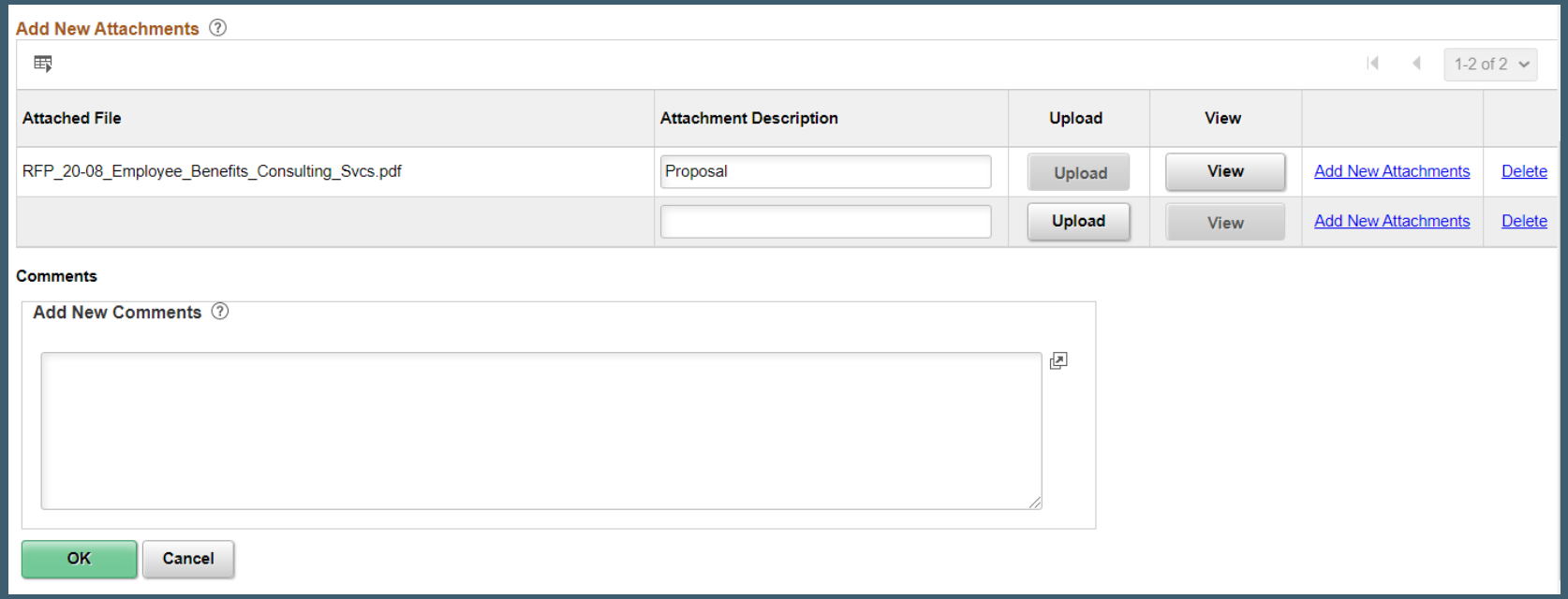
- Download RFP Documents
- Upload Proposal



Ebusiness Portal Overview

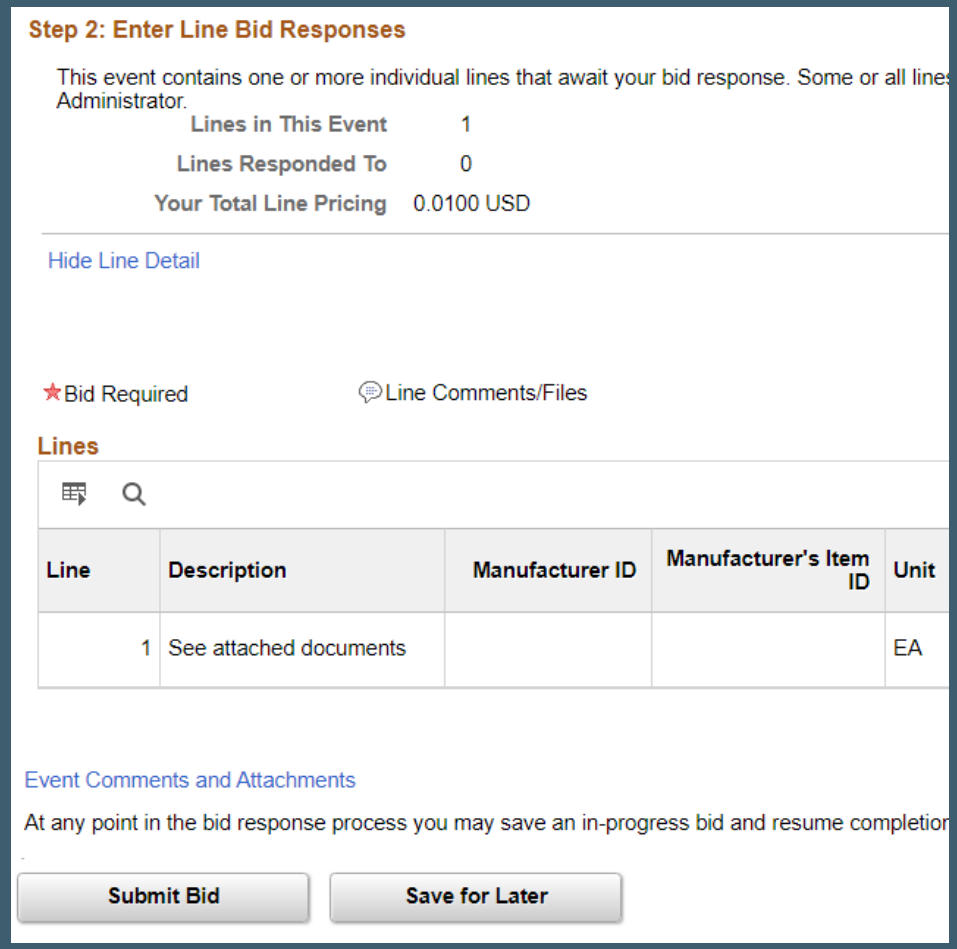
Pittsburgh Regional Transit

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



Ebusiness Portal Overview

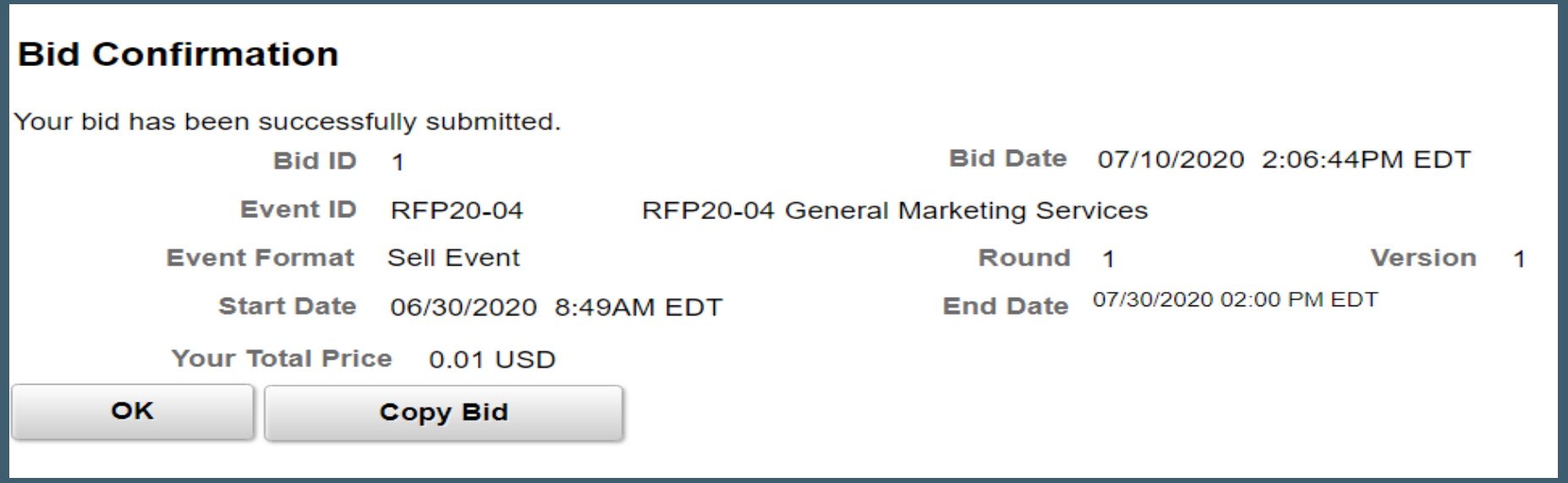
Pittsburgh Regional Transit



Save for Later vs. Submit Bid

Ebusiness Portal Overview

Pittsburgh Regional Transit



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



Pittsburgh Regional Transit

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



Pittsburgh Regional Transit

eBusiness Support

- Please contact the following for eBusiness questions:

John Young at

Jyoung@rideprt.org

Pittsburgh Regional Transit

General Overview of RFP Requirements

General Information

- **PRT is requesting proposals for:**
  - Financial Advisory Services

- **Term of the Agreements:**
  - Three-Year (3-year) period with the option to extend up to an additional two (2) one-year periods at PRT's sole discretion.

- **Termination for Convenience:**
  - As a public agency that receives federal funds, PRT will not negotiate the Termination for Convenience

General Information

- **Proposals must be submitted electronically through PRT's eBusiness system**
  - By 2:00 p.m., eastern standard time, July 09, 2026
  - Instructions have been provided in Exhibit 9 of the RFP

- **Questions must be received in writing no later than 10 days before Proposals are due.**
  - Cut off date is June 29, 2026
  - Procedural, please contact, John Young
  - Clarifications and questions to the RFP
    - **MUST BE IN WRITING**
    - Email Jyoung@rideprt.org or Fax (412) 566-5359

- **Tentative Presentation for Board Approval**
  - September 2026

SECTION 2.0- PROPOSAL REQUIREMENTS

Pittsburgh Regional Transit

- **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 Cost(s)
  - Appendix Information

- **Shall be no more than 40 pages**
  - Appendix information is in addition to page limit
  - Font Size for all material shall not be less than 10 pt.

SECTION 2.1.2
DB SUBCONTRACTOR PARTICIPATION

Pittsburgh Regional Transit

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

PRT's Diverse Business program requires that DBs have the maximum opportunity to participate in the performance of contracts and subcontracts.

PRT is aware of the United States Department of Transportation's Interim Final Rule, effective October 3, 2025, regarding the removal of Disadvantaged Business Enterprise (DBE) requirements from federally funded projects. However, as RFP 26-15 is not a federally funded project, the Commonwealth of Pennsylvania's Diverse Business Program requirements as stated in Section 303 of Title 74 of the PA Consolidated Statutes to "…seek to maximize participation by diverse businesses" remain in effect 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.

While there is no established goal on this specific RFP, proposers are required to identify subcontracting opportunities for the utilization of DB firms who are properly certified. If you are a DB proposer, you will still be required to identify subcontracting opportunities for the utilization of DBs.

SECTION 2.1.2
DB SUBCONTRACTOR PARTICIPATION

Pittsburgh Regional Transit

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:

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
5. Pennsylvania Unified Certification Program

While the Pennsylvania DB law remains in effect, the practical impact of the IFR removing the certified DBE status of all previously state UCP-certified DBE firms is that PRT Office of Small Business Engagement until completion of the reevaluation process, personnel cannot consider subcontractors or subconsultants proposed by prime contractors or consultants as "diverse businesses" if the only certification they hold is from the PA UCP. Rather, and at least temporarily, only a certification from one of the other four identified Pennsylvania certifying organizations will meet the "diverse business" definition/standard under the Pennsylvania DB law, unless the firm can provide documentation of completion of the reevaluation process.

SECTION 2.1.2
DB SUBCONTRACTOR PARTICIPATION

Pittsburgh Regional Transit

All proposed DBs must be PA certified with the Pennsylvania Department of General Services 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 a 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

SECTION 2.1.2
DB SUBCONTRACTOR PARTICIPATION

Pittsburgh Regional Transit

- Please be advised that neither sending mass emails nor contacting DBs using only one method do not constitute a good faith effort. If an email was sent and no response from the DB was received, follow up with the DB by phone.

  If assistance is required with identifying DBs to utilize, how to become a certified DB, or there are any other questions relating to DB participation, proposers should contact Sue Broadus at 412-566-5257. She 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 reported to the PRT Office of Small Business Engagement immediately. Please note that there are penalties imposed for non-compliance with the DB program.

  If there are any DBs present, please identify yourself and your company name.

SECTION 2.2
OVERVIEW OF PROPOSER
SECTION 1 OF THE PROPOSAL

Pittsburgh Regional Transit

- **Include a description of the Proposer and its subcontractors**

- **The Contractor shall provide, as part of their proposal responses, the aggregated percentage of work that is subcontracted, as measured in terms of cost to PRT**
  - The 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

Pittsburgh Regional Transit

- Provide relevant project experience of Proposer and its 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

Pittsburgh Regional Transit

- **Demonstrate understanding and approach**
  - **DO NOT REINTERATE THE RFP SCOPE OF SERVICES**

- **Identify each task and names of individuals or disciplines**
  - Include Subcontractors
  - Include hours associated
  - Requested narrative for the sample project

- **Flow Chart that explains the interrelationship of work tasks**

SECTION 2.5
PROJECT ORGANIZATION AND MGMT. PLAN
SECTION 4 OF THE PROPOSAL

Pittsburgh Regional Transit

- **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

Pittsburgh Regional Transit

- **Sample forms provided in Exhibit 6a & 6b**
  - Alternate fee structure may be proposed.

- **A separate Summary of Costs form is required for each subcontractor.**

SECTION 2.7
APPENDIX INFORMATION
APPENDIX SECTION OF THE PROPOSAL

Pittsburgh Regional Transit

- **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.

- **Resumes**
  - Exhibit 5
  - Not to exceed 20 pages

SECTION 2.7
APPENDIX INFORMATION
APPENDIX SECTION OF THE PROPOSAL

Pittsburgh Regional Transit

- **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**

  - **As a reminder, please review Exhibit 1. As stated in the RFP, deviations MUST be set forth in the Proposal to receive consideration.**

SECTION 3.0
PROPOSAL SELECTION PROCESS
EXHIBIT 8 – EVALUATION RATING CRITERIA

Pittsburgh Regional Transit

RFP REF SECTION	RATING CRITERIA	WEIGHTED MULTIPLIER
2.1.2	DB/DBE Utilization	4
2.3	Experience Record	8
2.4	Project Work Plan	5
2.5	Project Organization and Management Plan	4
2.5.2 & 3	Project Manager	7
2.5.2	Staff Resumes	5
2.6	Summary of Costs	8
	TOTAL WEIGHTED SCORE:	**41**

TENTATIVE DATES

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

Pittsburgh Regional Transit

• Last day for questions	June 29, 2026
• Proposal due at or before 2:00pm EST.	July 09, 2026
• Tentative Interviews	August 05 & 06, 2026
• Presentation for Board Consideration	September 25, 2026
• Commencement of Services	November 01, 2026



SECTION 4
SCOPE OF SERVICES

Overview of the Scope of Services

Presented by

- **Peter Schenk**
  - Controller

QUESTIONS AND ANSWER SESSION

Pittsburgh Regional Transit

All questions must be submitted in writing via email to

Jyoung@rideprt.org



RFP26-15 Potential DBE/DB List

The information provided in this file is not to be used for unsolicited advertising, spam, or any other unauthorized use.

Company Name	DBA Name	Owner First	Owner Last	Physical Address	City	State	Zip	Mailing Address	City	State	Zip	Phone	Fax	Email	Website	Agency	Certification Type	Ethnicity	Gender	Capability	County	Commodity Codes
Bailey White Solutions, LLC	BWS, LLC	Diane	White	239 Melrose Drive	Gilbertsville	PA	19525	239 Melrose Drive	Gilbertsville	PA	19525	215-219-8935		dwhitebws@outlook.com	bwsols.com	SEPTA	DBE	Black American	Female	BWS offers consulting services in the aviation, transit, and highway industry to Federal, state, local, and quasi governments, in the areas of Diversity, Transportation Grant Compliance, and Economic Development. Activities include providing interpretation, training, compliance, and oversight of federal, state and local requirements in the areas of financial, asset, grant and project management; procurement; and civil rights program implementation including Title VI, EEO, and DBE program and goal development.	Philadelphia	541611 - Administrative Management and General Management Consulting Services
Cameron Professional Services Group, LLC		Francine	Cameron	One Hope Square, 1901 Centre Ave Suite 202, Suite 202	Pittsburgh	PA	15219	One Hope Square, 1901 Centre Ave Suite 202, Suite 202	Pittsburgh	PA	15219	412-251-0607	412-745-9898	fcameron@cameronpsg.com	http://www.cameronpsg.com	AC	DBE	Black American	Female	Economic and housing development financial analysis, accounting and bookkeeping support (Quick Books), financial advisory services (life insurance, retirement), management consulting services, project management, administrative management, marketing, human resource consulting, training, and other management services.	Allegheny	523940 - Portfolio Management and Investment Advice; 524298 - All Other Insurance Related Activities; 531390 - Other Activities Related to Real Estate; 541211 - Offices of Certified Public Accountants; 541611 - Administrative Management and General Management Consulting Services; 541612 - Human Resources Consulting Services; 541613 - Marketing consulting services; 541614 - Process, Physical Distribution, and Logistics Consulting Services; 541618 - Other Management Consulting Services; 561110 - Office Administrative Services; 611430 - Professional and Management Development Training
EIM SERVICES, INC.		ETIENNE	BAKOUA-MBEBELET	6057 Dewayne Drive	Verona	PA	15147	6057 Dewayne Drive	Verona	PA	15147	412-401-3344	412-482-3661	sbakoua@eimservicesinc.com	http://n/a	AC	DBE	Black American	Male	Management consulting, financial management, staffing, information technology consulting, energy solutions and construction services. Certified Public Accountants. Other accounting services.;	Allegheny	541211 - Offices of Certified Public Accountants; 541219 - Other Accounting Services; 541611 - Administrative Management and General Management Consulting Services; 561320 - Temporary help services
EXICO, Inc.		EUSTACE	UKU	214 FARMINGTON ROAD	PITTSBURGH	PA	15215	214 FARMINGTON ROAD	PITTSBURGH	PA	15215	412-580-2491	412-772-1051	eouku@exicoinc.com	http://www.exicoinc.com	AC	DBE	Black American	Male	Management consulting firm providing services in financial management, registered municipal financial advisor and registered investment advisor, general management, training, international trade, contract personnel, staffing, claim recovery, renting, leasing and managing of space, retirement planning, accounting and auditing, temporary accounting and auditing staffing and temporary help services. Construction management excavation, water & sewer lines, highway & bridge inspection, road construction safety compliance and real estate development.;	Allegheny	236115 - New Single-Family Housing Construction (except For-Sale Builders); 236116 - New Multifamily Housing Construction (except For-Sale Builders); 236117 - Premanufactured housing assembled on site by for-sale builders; 236118 - Residential Remodelers; 236220 - Commercial and Institutional Building Construction; 237110 - Water and Sewer Line and Related Structures Construction; 237310 - Highway, Street, and Bridge Construction; 238910 - Site Preparation Contractors; 531120 - Lessors of nonresidential buildings (except miniwarehouses); 541211 - Offices of Certified Public Accountants; 541611 - Administrative Management and General Management Consulting Services; 561320 - Temporary help services
G-Entry Principle, PC		Napoleon	Nelson	2001 Hamilton Street - Suite 1101	Philadelphia	PA	19130	2001 Hamilton Street - Suite 1101	Philadelphia	PA	19130	215-563-4767	215-567-2217	nelsonnn@verizon.net		SEPTA	DBE	Black American	Male	Finance Advisory firm that serves governments and non-profits in developing and implementing high -impact financial initiatives.		523999 - Miscellaneous Financial Investment Activities; 525990 Other Financial Vehicles; 541219 - Other Accounting Services; 541611 - Administrative Management and General Management Consulting Services
Kala Consulting LLC		Jerril	Kalaparambath	327 BYBERRY RD	HUNTINGDON VALLEY	PA	19006	327 BYBERRY RD	HUNTINGDON VALLEY	PA	19006	267-760-0267		jerril.kala@datalabeler.com	http://www.datalabeler.com	PENNDOT	DBE	Subcontinent Asian American	Male	Application hosting (excluding software publishing); Automated data processing services; Cloud computing services (except software publishing and computer systems design); Cloud storage services; Computer data storage services; Computer input preparation services; Data capture imaging services; Data entry services; Data processing computer services; Data processing services (except payroll services, financial transaction processing services); Web hosting (excluding software publishing); Custom Computer Programming Services; Contract staffing services; Online temporary staffing services, including intermediary platform services; Outplacement consulting services; Outplacement services; Temporary employment services; Temporary help services; Temporary staffing services	Montgomery	518210 - Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services; 541511 - Custom Computer Programming Services; 561320 - Temporary Help Services
Lobrien Enterprises Limited	LCL Advisors, Inc	Mary D.	Lobron	1127 Edgewood Avenue	Berwyn	PA	19312	1127 Edgewood Avenue	Berwyn	PA	19312	610-889-2005	610-889-2006	mary@lobron.com	http://www.lcladvisors.com	PENNDOT	DBE	Caucasian	Female	Business management, financial management, general management, reorganizational and strategic planning consulting services; operations research consulting services, transportation management consulting services; public relations services.	Chester	541611 - Administrative Management and General Management Consulting Services; 541614 - Process, Physical Distribution, and Logistics Consulting Services; 541820 - Public relations agencies
North South Capital LLC		Jane	Ott	321 West Maple, Suite 100	New Lenox	IL	60451	321 West Maple, Suite 100	New Lenox	IL	60451	312-445-5402		jott@northsouthcap.com	http://www.northsouthcap.com	AC	DBE	Caucasian	Female	Full service broker dealer and Registered Investment Advisor (RIA) providing global and domestic equity execution, municipal investment underwriting, global and domestic fixed income dealer, and private wealth financial advisory;	Will	523150 - Investment banking
Ricardo Luckow, CPA	RL Consulting	Ricardo	Luckow	2634 Woodmont Lane	Pittsburgh	PA	15090	2634 Woodmont Lane	Pittsburgh	PA	15090	412-901-9681		ricardo@rl-innovation-outsourcing.net		AC	DBE	Hispanic American	Male	Accounting and financial management of small business and government entities/programs. Also, related projects such as design of financial reporting systems, projections, forensic accounting, and audit preparation services.;	Allegheny	541211 - Offices of Certified Public Accountants; 541611 - Administrative Management and General Management Consulting Services
Rockland Planning, Inc.		Yesinia	Bane	6754 Jonestown Road	Harrisburg	PA	17112	6754 Jonestown Road	Harrisburg	PA	17112	610-780-7707		ybane@rocklandplanning.com	http://www.rocklandplanning.com	SEPTA	DBE	Hispanic American	Female	Planning, Policy, Financial and Economic Development, Project Development and Management services predominantly to Public Agencies and Private Development firms for Transportation and Community Redevelopment Projects	Allegheny	541611 - Administrative Management and General Management Consulting Services
SIDWAY CONSULTANTS INC		STANLEY	DIKE SR	7006 ELMWOOD AVENUE, SUITE 1	PHILADELPHIA	PA	19142	7006 ELMWOOD AVENUE, SUITE 1	PHILADELPHIA	PA	19142	215-883-0152	267-353-8973	sdike@sidwayconsultants.com	http://www.sidwayconsultants.com	SEPTA	DBE	Black American	Male	Tax preparation, accounting services, auditing, compliance reviews, payroll services, financial statements, fraud investigations		541213 - Tax Preparation Services; 541214 - Payroll Services; 541219 - Other Accounting Services; 541611 - Administrative Management and General Management Consulting Services
Sionainn Consulting LLC	Schooley Mitchell of Pittsburgh - Mischler	Shannon	Mischler	5535 Forbes Ave, Unit E	Pittsburgh	PA	15217	5535 Forbes Ave, Unit E	Pittsburgh	PA	15217	412-889-9651		shannon.mischler@schooleymitchell.com	https://www.schooleymitchell.com/office/smischler/	AC	DBE	Caucasian	Female	Primarily engaged in providing operating advice and assistance to businesses and other organizations on administrative management issues, such as financial planning and budgeting, equity and asset management, records management, office planning, strategic and organizational planning, site selection, new business start-up, and business process improvement	Allegheny	541611 - Administrative Management and General Management Consulting Services
Strategic Community Engagement, LLC		Alice	Williams	1413 Marlboro Avenue	Pittsburgh	PA	15221	1413 Marlboro Avenue	Pittsburgh	PA	15221	412-867-1604	412-241-0626	strategiccommunityengagement@gmail.com		AC	DBE	Black American	Female	Professional consulting firm providing management consulting, business start-up development, strategic organization and planning, financial planning, business process and improvements, office management and Professional management development training.	Allegheny	541611 - Business management consulting services; 541611 - Business start-up consulting services; 541611 - Administrative Management and General Management Consulting Services
Talson Solutions, LLC		Robert S.	Bright	41 N. 3rd Street	PHILADELPHIA	PA	19106	41 N. 3rd Street	Philadelphia	PA	19106	215-592-9634	215-592-9636	info@talsonsolutions.com	http://www.talsonsolutions.com	SEPTA	DBE	Black American	Male	Capital Project Consulting - Performs construction contract compliance reviews/audits; Project risk assessments and review financial policies and procedures; claims analysis; consulting services to transportation industry; construction project management	Philadelphia	236220 - Commercial and Institutional Building Construction; 541219 - Other Accounting Services; 541611 - Administrative Management and General Management Consulting Services; 541614 - Process, Physical Distribution, and Logistics Consulting Services; 541618 - Other Management Consulting Services; 541690 - Other Scientific and Technical Consulting Services; 541990 - All Other Professional, Scientific, and Technical Services
The Hermitage Group, LLC		Japheth	Mukogosi	5221 Beeler Street, Suite 301	Pittsburgh	PA	15217	5221 Beeler Street, Suite 301	Pittsburgh	PA	15217	412-901-2156	412-683-2202	jm@hermitageconsulting.com	http://www.hermitageconsulting.com	AC	DBE	Black American	Male	Management consulting services that include financial consulting, business consulting. and contract management;	Allegheny	541611 - Administrative Management and General Management Consulting Services
US ATM Network, Inc.	US Payment Network	Kimberly	Mckinley	1229 Green Meadow Rd	Carbondale	CO	81623	PO Box 259	Basalt	CO	81621	970-379-4559	970-315-0211	kmckinley@usatmnet.com	https://usatmnet.com/	PENNDOT	ACDBE	Hispanic American	Female	Full service independent ATM deployer - ATMs (automated teller machines) installation; Financial Transactions Processing, Reserve, and Clearinghouse Activities including automated teller machine (ATM) or automated loan machine (ALM) network operation, credit card processing services, and electronic financial payment services.	Garfield	238290 - ATMs (automated teller machines) installation; 522320 - Financial Transactions Processing, Reserve, and Clearinghouse Activities

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Company Name	DBA Name	Owner First	Owner Last	Physical Address	City	State	Zip	Mailing Address	City	State	Zip	Phone	Fax	Email	Website	Agency	Certification Type	Ethnicity	Gender	Capability	County	Commodity Codes
Cameron Professional		Francine	Cameron	One Hope Square, 1901 Centre Ave Suite 202, Suite 202	Pittsburgh	PA	15219	One Hope Square, 1901 Centre Ave Suite 202, Suite 202	Pittsburgh	PA	15219	412-251-0607	412-745-9898	fcameron@cameronpsg.com	http://www.cameronpsg.com	AC	DBE	Black American	Female	Economic and housing development financial analysis, accounting and bookkeeping support (Quick Books), financial advisory services (life insurance, retirement), management consulting services, project management, administrative management, marketing, human resource consulting, training, and other management services.	Allegheny	523940 - Portfolio Management and Investment Advice; 524298 - All Other Insurance Related Activities; 531390 - Other Activities Related to Real Estate; 541211 - Offices of Certified Public Accountants; 541611 - Administrative Management and General Management Consulting Services; 541612 - Human Resources Consulting Services; 541613 - Marketing consulting services; 541614 - Process, Physical Distribution, and Logistics Consulting Services; 541618 - Other Management Consulting Services; 561110 - Office Administrative Services; 611430 - Professional and Management Development Training
Copana Pa	Counting the Beans	Michael	Hammond	50 E Abington Ave	Philadelphia	PA	19118	50 E Abington Ave	Philadelphia	PA	19118	212-873-1475		michael@copana.com	http://copana.com	PENNDOT	DBE	Black American	Male	Construction management, commercial and institutional building; Portfolio Management and Investment Advice; Offices of Real Estate Agents and Brokers; Administrative Management and General Management Consulting Services.	Philadelphia	236220 - Construction management, commercial and institutional building; 523940 - Portfolio Management and Investment Advice; 531210 - Offices of Real Estate Agents and Brokers; 541611 - Administrative Management and General Management Consulting Services
Financial Ir	Financial Integrity Advisors, LLC.	Philip	Harris	1800 JFK Blvd, Suite 300, Suite300	Philadelphia	PA	19103	1800 John F Kennedy Blvd, Suite 300	Philadelphia	PA	19103	215-557-7622	215-557-7632	jeanette@firmadvisor.com	http://www.firmadvisor.com	PHL	DBE	Black American	Male	Portfolio Management and Investment Advice; Insurance Agencies and Brokerages; All Other Insurance Related Activities; Pension Funds; Health and Welfare Funds; Human Resources Consulting Services	Philadelphia	523940 - Portfolio Management and Investment Advice; 524210 - Insurance Agencies and Brokerages; 524298 - All Other Insurance Related Activities; 525110 - Pension funds; 525120 - Health and welfare funds; 541612 - Human Resources Consulting Services