

PITTSBURGH REGIONAL TRANSIT

TRANSMITTAL MEMORANDUM No. 3

SUBJECT: Request for Information No. 26-34
Enterprise Resource Planning (ERP) Replacement Consideration Phase
DATE: August 18, 2026

Please find enclosed the following:

- RFP26-34 Information Meeting Minutes
- RFP26-34 Information Meeting PowerPoint Slide Deck
- RFP26-34 Information Meeting Attendance
- RFP26-34 Information Meeting PowerPoint Slide Deck
- RFP26-34 Q&A

The following signature acknowledges the receipt of this Transmittal Memorandum 3.

Signature

Name of Company

Date

As a reminder, please include and submit these as part of your Proposal Response rather than prior to the due date – these documents do not need submitted separately.

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: Keith Bayles

PITTSBURGH REGIONAL TRANSIT

Enterprise Resource Planning (ERP) Replacement Consideration Phase
Request for Information No. 26-34
August 14, 2026
Information Meeting Minutes

The Information Meeting for the above-referenced Request for Information (RFI) was held on August 14, 2026 scheduled to begin at 10:30am ET. A copy of the sign-in sheet of attendees is attached.

Keith Bayles, Procurement Manager, opened the meeting for PRT. The other PRT attendees making presentations were:

- Dawn Hinzman, Manager of Administrative Apps, Enterprise Software, Agency Innovation Services
- Erik McKibben, Director of Enterprise Software, Agency Innovation Services

Keith Bayles then discussed the following issues:

- Electronic proposals must be both received and timestamped by PRT's eBusiness website at or before **3:00p.m. ET**, prevailing time, **September 15, 2026**, at <http://http://ebusiness.ridePRT.org>. Proposals received or timestamped after the advertised time for the submission of proposals shall be non-responsive and therefore not reviewed. 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 or material clarification questions concerning this RFP should be directed to Keith Bayles, in writing, at kbayles@rideprt.org. PRT will not respond to questions received, other than procedural, after August 21, 2026 no later than 12:00pm ET prevailing time.
- As this is a Request for Information (RFI) we do not have DB requirements as apart of this solicitation.
- All questions relating to clarifications of, or modifications to, the RFI **must be in writing**. If any questions submitted make necessary the issuance of an addendum, an addendum will be issued to all RFI document holders. Proposals must be submitted based on the RFI as written, and as modified by Addenda.
- Keith Bayles provided 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 solicitations, the subsequent addenda and other related information, and to submit a Proposal in response to this RFI 26-34.
- Erik McKibben and Dawn Hinzman provided a general overview of the scope of services that PRT is seeking via this RFP. Section 2.2 through 4.3 of the RFP on pages 9 through 14 of the RFI documents contains that scope of services.
- The anticipated Procurement Schedule for the RFI is as follows:
 - Proposers' last day for submitting questions is August 21, 2026.

- Proposals are due at the PRT by 3:00 PM, September 15, 2026.
 - Interviews are tentatively scheduled for late September, early October 2026.
- Following the overview of the scope of services, the floor was opened for general discussion and any questions from the attendees. The questions were as follows:

QUESTION 1: Timeline for implementation?

RESPONSE 1: We're in a fact-finding mode now just to see what's in the market, I should have actually probably elaborated on that a little bit. The goal of this RFI is to look at the requirements that we have for the business, work with the business users and our finance inventory and HR department divisions to figure out what is the best step forward, so we have not seen what the market has developed in the last 20 plus years, so we're very curious to see what's there. We still have current support through Oracle support or Oracle support provided through a vendor. And we're in a solid position right now, so there's no hard deadline, but we'd like to get this RFI wrapped up and take a look at the scope in the next couple months and decide what the next step will be.

QUESTION 2: Can you tell us what you mean by PeopleSoft Fusion? As you already have stated, one of the options that you were looking for is PeopleSoft One Cloud.

RESPONSE 2: I believe that PeopleSoft Fusion was a typo.

QUESTION 3: Which PeopleSoft version, modules, customizations, interfaces and third-party applications are currently in use.

RESPONSE 3: We have the modules listed [on the addendum and in the documentation], PeopleSoft 92, and what version of the PUM is there. Customizations is a very long list, interfaces and third-party applications are listed. We can provide additional details to this point, it's we're looking for ballpark costs to implement a solution, not to actually get pricing right now. I need to be able to say for cost estimate going forward, in general, with a company of our size, with a system of our size, [these] are the costs to be able to present to our board. I'm not looking for your absolute best pricing now, but if we know that we have 15 different types of interfaces of different types and customizations, and if I tell you that there's 1000 versus 2000 customizations, we can provide that information. A list of customizations will be very onerous, but I have to see exactly what you would need with information and detail to that question to help you get a better answer.

QUESTION 4: There are several ERP systems capable of meeting the needs. Is it acceptable to outline how different ERP systems satisfy our requirements? And have you thought about going through a process to define your future state strategy and select the best fit?

RESPONSE 4: I'm going to say just a high level, yes, we are willing to look at the different systems and how they would meet our needs. That's kind of the point of the RFI. And then as for the starting process, we're using the RFI as the beginning process simply because we don't know what the market has available right now. We know where our current system sits. We understand and can visualize what our strategy will be moving forward. We just need to understand how to get there, what options and tools we have available. So since this is just an RFI, if you part of your proposal could be "here's how I believe this set of ERP functions or different pieces of software integrated together will work and this is how the integrations are sustainable and supportable versus fragile, and we've seen that in previous systems where lots of interfaces had to be built in the correct where there's a lot of care and feeding." So if the proposer can actually show us that that's a viable solution, we're willing to consider it because that's what this process is for us to learn.

QUESTION 5: Are we anticipating any integrations with transit specific systems such as ticketing, scheduling, et cetera?

RESPONSE 5: It's possible. Right now we have an interface with our fare product vendor, but that is changing, and the new system does not require that kind of interface. Interfaces will change as business needs [change], so that's what they evolve. That's why we want to know what are the capabilities of your system. To me, an interface, as long as there's a documented API and the functionality is there, then the interface to any type of system should be available.

QUESTION 6: Are you open to moving toward an industry standard business process, or are you looking for a lift and shift of your current process?

RESPONSE 6: I will be very honest and say that any system that we evaluate is going to have to be responsive to our business needs. Picking an off-the-shelf piece of software and asking the entire company to change the business, the requirements and how that calculates. Some things are statutory; some things can't be changed. We have to be responsible to our internal customers about how this will be implemented, that's why I'm hoping that you can show in your products, this is how we can meet those needs. And if you can establish and show, hey, we can actually implement that with the delivered functionality, even better. But if there's a way to tweak and tune it. I'd love to see that.

QUESTION 7: Will PRT establish a specific small business participation goal or percentage allocation for the solicitation, including subcontracting opportunities for DBE, SBE, WSB, HUBZone, and other certified small businesses?

RESPONSE 7: For this one specifically, this is an RFI, Request for Information. We don't have a goal because we don't intend to award a contract resulting from this. This will not lead to a contract. This is merely just to test the market to see where we're at. However, given that we are a state agency, all of our solicitations do in fact have a carve out for DBE and small business participation. So yes, that does in fact happen in all of them.

QUESTION 8: Given PRT's interest in integrating the heavily customized pension framework into core ACM, FSCM, is PRT open to a phased approach where pension migrates in a later wave while other modules move first, or is full integration expected in the initial go-live? I believe that specific to the Pension portion itself, right?

RESPONSE 8: My opinion to that would be is if you can show us how that would work, I don't see that as a problem of at least considering a phased approach. If you can actually accommodate the pension functionality, then we can see how what will work and we'd have to meet with the business users to actually determine what their preferences would be. But I'm open to seeing what the proposal would be.

QUESTION 9: Can you let us know how much percentage of your PeopleSoft system is customized? Is it heavily, moderately? Do we know?

RESPONSE 9: I'll answer briefly and Dawn can answer more specifically because it kind of goes back to the pension. The pension application was built using PeopleTools and PeopleSoft objects. There have just been numerous connections that have failed over the years as upgrades have occurred around it and that was considered off limits. As far as the customization level now, Dawn, do you want to go into the other applications.

(Dawn): I would say medium to heavily. Our employee relations are heavily customized. We've got a lot of heavily customized procurement processes that definitely need to be improved. We've got a significant amount of customization, but that also needs to fit into our business rules and support our business processes.

QUESTION 10: Will you require an RFI response to participate in a potential RFP?

RESPONSE 10: No. This is, it's a non-mandatory meeting. It's A non-mandatory solicitation. We will absolutely accept if we move to a new solicitation for an actual procurement of an ERP software system. We would absolutely invite anybody and everybody, whether you submitted an RFI response or not. The RFI is just for us, so we understand what we need.

QUESTION 11: Would you invite respondents to demo the solution?

RESPONSE 11: Yes, that kind of goes back to one of the previous slides that after we get the solicitation responses, we're going to review them and understand what the market has and what's available, and then I would say most likely, we will actually invite respondents in to provide demonstrations. That will occur a little later [around] September, October. And also, with me working with the end users and the project managers, the demonstration may be a little more specific to what PRT has, as in, instead of just a demonstration of out-of-the-box, [you] can do this and that [and show] how can you actually help our core business needs.

QUESTION 12: Due to the decent amount of customization for internal apps and reporting that currently rely on direct SQL server and database connections to HCM, FSCM, is PRT open to an API-based or data warehouse-based access pattern as a replacement, or is Native Direct DB access considered a hard requirement?

RESPONSE 12: It's not a hard requirement. I know that that method of access is generally not a first line or a first recommended option for most vendors. And while most of our newer applications are API based, there are still some things, And we understand that there will be some conversions to how we access data. So some of these things could be moved to a data warehouse and difference from there, or if we have ways to replicate some of that functionality, as long as we have access to data that we can pull in and manipulate on our end, we'll be okay.

QUESTION 13: It sounds like you haven't seen any recent demos for potential ERP solutions over the last year. Is that correct?

RESPONSE 13: I say in the last year, no. We've implemented the budget module from Unit Solutions Questica, but that was over the last couple of years and that was focused specifically on that area, not a broad ERP. At least I haven't. I don't know if any of the user groups have.

QUESTION 14: Would you have some scripts in mind for the demo at this stage? Are there business processes you'd like to see in a demo that address some of the key pain areas?

RESPONSE 14: We have outlined a fairly decent list of specific pain points. Whenever this solicitation ends, September 15th, and we do move to a demonstration portion, we would be able to provide that [script]. A lot of times what I will do I provide specific questions ahead of time, that way you can research your answers and come prepared. And in that, we would also probably provide you the pain points or things that we want to see.

QUESTION 15: We never did public sector in the past, so there may, so we may not have matching references. Shall we still participate?

RESPONSE 15: I would say absolutely. Public sector and private sector do share similarities. The issue that you run in with public sector is just we have more requirements, strict requirements due to statutes and things of that nature because of the transparency we need to show. But otherwise, if the references you have are similar in size and scope to what we're requesting, yes, by all means, please submit. It'll come down to the finance and HR decision makers looking at it and seeing if it meets the accounting and reporting needs.

QUESTION 16: What would your preferred solution be? A modernization cloud-based solution, either using PeopleSoft / any other technology, or retain the value of current investment, enhance the current on-prem solution to meet requirements?

RESPONSE 16: Both of those are valid options. As far as a preferred solution, it's a multifaceted answer, right? To say if I want to go with a cloud-based solution, I have to look at all the costs to get there. If I go with enhancing the current system and making sure that it tries to look as modern as it can with all the features that people, and tools [that] have rolled out, but we haven't implemented. That's a different set of costs. So we just have to weigh those two. Right now, I don't think anybody on our side has any preferences one way or the other. We'd like to see what the market offers. I know what I pay for support right now, and my through licensing and human costs, so we have to compare that to whatever the solutions proposed are.

The meeting was adjourned at 11:17am ET prevailing time.



Keith Bayles
Procurement Manager

attachment(s)

cc: Project File



Information Meeting

RFI No. 26-34

Enterprise Resource Planning (ERP) Replacement
Consideration Phase

August 14, 2026

Introductions

Procurement

- Keith Bayles, Procurement Manager kbayles@rideprt.org

Department

- Dawn Hinzman, Manager of Administrative Apps, Enterprise Software, Agency Innovation Services
- Erik McKibben, Director, Enterprise Software, Agency Innovation Services
- Cynthia Weissman – ERP Evaluation Consultant, Enterprise Software, Agency Innovation Services

General Information

eBusiness

- If you are not registered in eBusiness, please do so as soon as possible.
 - Go to eBusiness.rideprt.org for a User Guide and Registration.
 - Reference Exhibit 2 – Guide for Submitting Proposals.
- Verify your account, including access, username(s), email(s), and password.
- If you are not registered with eBusiness, please contact me via email.

General Information

Solicitation

- **All questions must be in writing and emailed directly to the Procurement Officer.**
 - Keith Bayles, kbayles@rideprt.org
 - Communications with any other PRT representative may not be addressed.
 - Please format RFP 26-34 ERP Replacement Consideration Phase ~ Question
- **Solicitation responses must be submitted electronically through eBusiness.**
 - Physical, facsimile, and/or telephonic responses will not be considered.
 - Site: <https://ebusiness.rideprt.org>
 - eBusiness may not be responsive to mobile devices – PC or laptop is recommended.

General Information

- Interested parties are encouraged to ask questions to assist PRT in evaluating the market interest, capabilities, and other information related to the core business needs.
- Responses will be reviewed and notifications will be provided to all Proposers detailing PRT's intent for the future of this project.
- Similar to Request for Proposals, responses will not be publicly opened, and all responses and reviews will be kept confidential.
- Concluding the preliminary review, responsive and responsible Proposers maybe be requested to provide clarifying information in writing or be requested to provide a demonstration of their solution.

RFI 26-34 Schedule

- Deadline for Questions:
 - Date: August 21, 2026
 - Time: 12:00pm ET (Noon)

- Due Date:
 - Date: September 15, 2026
 - Time: 3:00pm ET

- Tentative Interviews:
 - Date: September 2026



RFI 26-34 Project Info – Scope and Goals

PRT is investigating the market to gather information for available ERP software options. PRT is including specific questions and high-level expectations to provide for our unique core business needs.

Currently, PRT utilizes Public Sector PeopleSoft Applications with the intent to:

- Move to a new comprehensive ERP system, which is preferred, or a combination of systems that best support our needs; or
- Move to a cloud-based version of PeopleSoft or PeopleSoft Fusion; or
- Continue to utilize the current PeopleSoft on-prem product with enhancements.

RFI 26-34 – Important Sections

- **Section 1.7 – Pennsylvania’s Right-to-Know Law**

- Proposer is to familiarize themselves with this section **as it as written in this specific RFI**, which differs from how it is written in other PRT solicitations.

Section 2.1.1 – Submission Guidelines

- **Among the criteria, PRT would like to point out:**
 - Response is to be a single PDF file; if files **must** be separated, submit as few files as necessary.

RFI 26-34 – Important Sections

- **Section 2.1.1 – Submission Guidelines (cont'd)**

- Response is to be no more than twenty (20) pages (title page, cost summary, and appendices are not counted in this number).
 - *Please do not include superfluous information in the appendices.*
 - Sub-letter “L” provides the anticipated organization of the response.

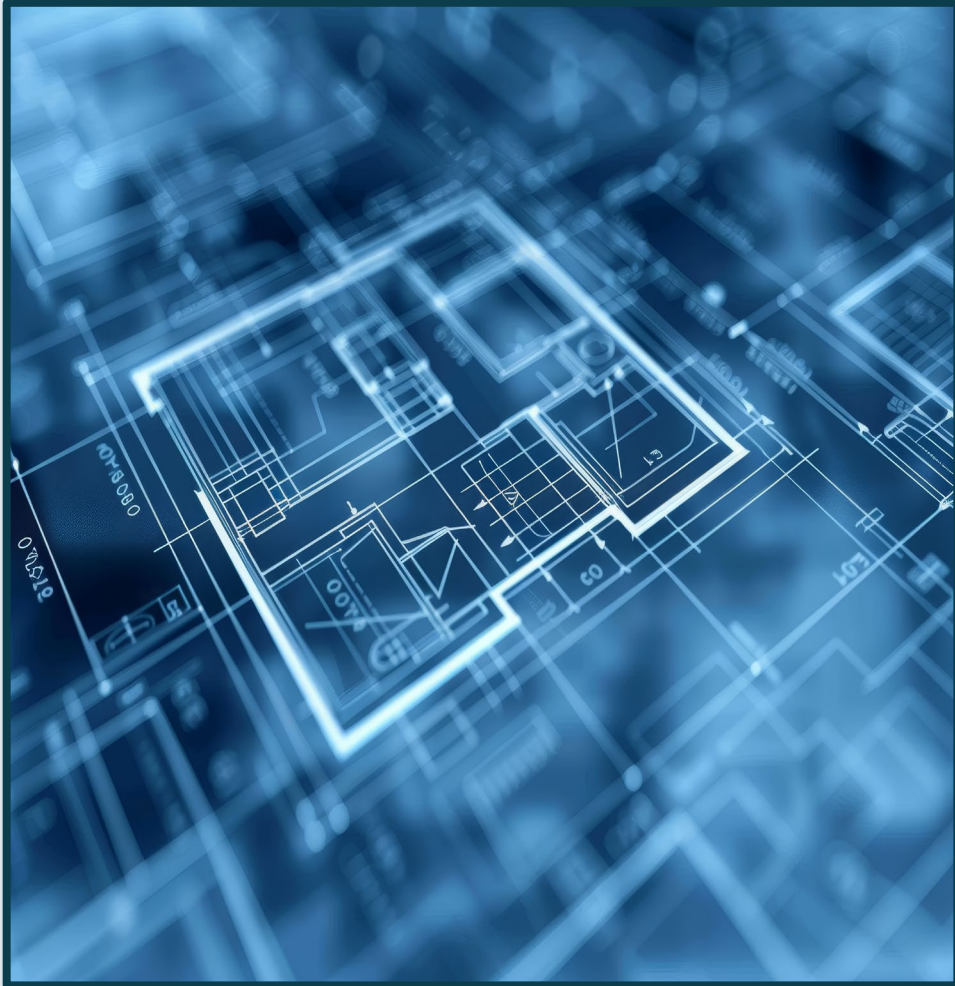
RFI 26-34 – Important Sections

- **Section 2.2 – Supplier Experience and Expertise**
 - Provide concise description of your organization inclusive of subsidiary companies, length of time in business, and if a reseller, how long has your organization been a certified reseller.
 - Provide three (3) client references for similar projects within the last three (3) years.

RFI 26-34 – Important Sections

- **Section 2.4 – Technical Requirements, Capabilities, and Methodology**
 - Respondents are encouraged to ask clarifying questions as needed to aid PRT in the market.
- **Section 2.5 – General Information**
 - Describe organizations approach, deliverables, and milestones.
- **Section 2.6 – Pricing Model**
 - Reference Exhibit 1 Summary of Cost

RFI 26-34 – Scope of Services



Project overview presented by

- **Dawn Hinzman**
- **Erik McKibben**
- **Cynthia Weissman**

RFI 26-34 – Conclusion



**Open Session for
Questions**

Meeting title	Request for Information (RFI) 26-34 - ERP Replacement Consideration Phase Information Meeting
Attended participants	60
Start time	8/14/26, 10:24:43 AM
End time	8/14/26, 11:17:43 AM
Meeting duration	52m 59s
Average attendance time	36m 59s

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Turner King		

PITTSBURGH REGIONAL TRANSIT

Enterprise Resource Planning (ERP) Replacement Consideration Phase Request for Proposal No. 26-34 Transmittal Memorandum 3

QUESTION		RESPONSE
No.	Section	
1	1.1	Introduction 1.1, People Tools versions; Could PRT please tell us what PUM release each of the applications are currently on?
2		HR 9.2 – PUM 51, Tools 8.61.20 FIN 9.2 – currently on PUM 44, Tools 8.59.11 but upgrading to PUM 57, Tools 8.62
		There are several ERP systems that are capable of meeting the needs of PRT. Is it acceptable to outline how different ERP systems satisfy PRT's requirements and answer your specific questions (including those related to cost)?
2a		Yes, this is acceptable and desired.
		Have you thought about going through a process to define your future state strategy and select the best fit ERP for PRT. Is PRT open to a phase 0 strategy and selection?
3		PRT's strategy and selection process begins with the RFI to better understand the market, and then take this market information to determine next steps.
		Post implementation of the ERP, what systems are anticipated to remain in addition to the ERP that would need to be integrated to? Additionally, please provide an overview of any other anticipated integrations.
		Integrations include: 1. Hastus 2. Learning Management System* 3. Questica* 4. Career Management (in-house developed) 5. Internal integrations between ERP applications if needed. * If new ERP system does not provide a solution.
4		Does PRT have a preferred implementation approach? Are there any preference in terms of a big-bang vs. phased approach?
		PRT prefers a phased approach, but will consider other options.
5		I have reviewed the available documents...there are [many] cost drivers such as payroll, pension, and several integrations..., given [the large number of variables and potential unknowns], would a preliminary "guesstimate" ...be useful...?
		Yes, PRT provided estimates for licensing in Addendum 2, but PRT only provided a high overview, but generally we would like the cost associated with each consulting phase deemed necessary to deliver the project, including software licensing costs and any required third parties.

Keith Bayles, Procurement Manager