



# REQUEST FOR QUALIFICATIONS

SRTA SOLICITATION # 27-001

## STATE ROAD AND TOLLWAY AUTHORITY CUSTOMER SERVICE STAFFING OPTIMIZATION

### Schedule of Events

RFQ Issue date	March 5, 2026
Deadline for Proposers Written Questions	March 19, 2026 (5:00 PM ET)
SRTA Response to Written Questions	March 25, 2026
<b>Statement of Qualifications due date</b>	<b>April 6, 2026 (3:00 PM ET)</b>
RFQ Evaluation Period	April 6 – April 23, 2026
Notification to Finalists	April 30, 2026



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## PART 1 -SOLICITATION AND SHORTLIST

### 1 General Information

#### 1.1 Purpose of Procurement

The State Road and Tollway Authority (SRTA) is requesting firms interested in providing Customer Service Operations and Support to submit information regarding their qualifications as specified herein.

SRTA intends to award a single contract for the requested services through a two-step procurement process consisting of this RFQ, followed by a Request for Proposals (RFP). The RFQ phase of the procurement will establish a shortlist of the most qualified vendors (Shortlist) based on the evaluation criteria set forth herein. Only vendors shortlisted during the RFQ phase can participate in the RFP portion of the procurement. Only those Proposers on the shortlist will be eligible to submit a proposal in response to SRTA's Customer Service Staffing Optimization RFP. The scoring from the RFQ phase will not be carried over to the RFP phase.

The Services to be performed correspond to the following National Institute of Government Purchasing (NIGP) general commodity codes:

- 95893 – Toll Management & Operation Services

A complete copy of the RFQ document can be accessed on:

- (1) Georgia Procurement Registry website at [http://ssl.doas.state.ga.us/PRSapp/PR\\_index.jsp](http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp)
- (2) SRTA website at: <https://www.srta.ga.gov/srta-procurement/>
- (3) Important notifications leading up to the RFQ Submission Deadline will be posted to the same sites

#### 1.2 SRTA CSC Operations Background

SRTA's Customer Service Center (CSC) provides account management, transaction and violation processing for all Express Lane customers utilizing Peach Pass transponders across SRTA-operated facilities, including the I-75 South Metro, I-85 Express Lanes and Extension, and Northwest Corridor Express Lanes.

SRTA will provide and retain responsibility for the upkeep and maintenance of all cloud-based core systems supporting CSC operations. SRTA will also remain responsible for updates, enhancements, and ongoing maintenance of the My Peach Pass website, the Interactive Voice Response (IVR), and the Peach Pass GO! Mobile app.

ViaPlus provides the Back Office System (BOS) as well as manages the Genesys IVR system, the I-85 roadside system is provided by Quarterhill, and the I-75 roadside system is provided by Neology. The vendor will interface directly with the BOS and other systems as part of service delivery and shall coordinate with SRTA and its vendors as necessary for efficient operations and data integrity across all platforms.

The CSC is responsible for assisting the customer through the full lifecycle of customer account activity, from account creation, transponder fulfillment, violations processing, payment reconciliation, and dispute resolution.

These operations are supported through multiple customer access channels, including:

- **Website Mypeachpass.com:** Provides online functionality for new account setup, transponder registration, payments, balance management, and toll history review.
- **Mobile App Peach Pass GO!:** Allows customers to view real-time toll activity, manage vehicles and payment methods.

- **Peach Pass Verify App:** Enables customers to declare a 3+ person occupancy to qualify for toll-free travel on Georgia's I-85 and I-85 Extension Express Lanes.
- **Call Center / IVR:** A multilingual customer support line (1-855-PCH-PASS) that handles inquiries, disputes, and payments Monday through Friday (7:00 AM - 6:00 PM).
- **Mail and Email Correspondence:** Case management supports violation processing, violation resolution, and administrative requests.
- **Retail Center:** Provides physical locations for customer support.

CSC operations directly support SRTA by enrolling new Peach Pass customers, educating the public on tolling operations, and providing customer account management, customer satisfaction, and compliance with operational performance targets.

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### 1.3 Solicitation Schedule

The times contained throughout this solicitation represent local Atlanta time.

RFQ Issue date	March 5, 2026
Deadline for Proposers Written Questions	March 19, 2026 (5:00 PM ET)
SRTA Response to Written Questions	March 25, 2026
<b>Statement of Qualifications due date</b>	<b>April 6, 2026 (3:00 PM ET)</b>
RFQ Evaluation Period	April 6 – April 23, 2026
Notification to Finalists	April 30, 2026

Qualifications submitted in response to SRTA Solicitation No. 27-001 must be received no later than **3:00 PM Eastern Time (ET) on April 6, 2026. Proposals received after the deadline will not be evaluated.**

### 1.4 Restrictions on Communications with SRTA

From the date of issuance of this solicitation through the date of Contract award, Proposers are not allowed to communicate for any reason with SRTA employees, any participants in this procurement, or any SRTA Board Members regarding this procurement. All Proposer communications concerning this solicitation should be directed to the Issuing Officer. Prohibited communication includes all contact or interaction regarding this solicitation, including, but not limited to, telephonic communications, emails, faxes, letters, texts, or personal meetings. Unauthorized contact regarding this solicitation may result in disqualification.

SRTA is not responsible for any oral statements made by their employees regarding this solicitation. All official communications to and from SRTA regarding this solicitation shall be transmitted in writing from the Issuing Officer.

### 1.5 Contact Information

All inquiries, offers, submissions, and/or other correspondence regarding this solicitation must be directed in writing to:

State Road and Tollway Authority  
245 Peachtree Center Avenue NE, Suite 2200  
Atlanta, GA 30303

**Issuing Officer:** Staci Winston, Director of Procurement and Contracts  
**RFQ Proposal & Reference Submission Email:** [procurement@srta.ga.gov](mailto:procurement@srta.ga.gov)  
**Questions Submission Email:** [procurement@srta.ga.gov](mailto:procurement@srta.ga.gov)

## 1.6 Bonds

Bonds at the RFP stage, shortlisted Proposers may be required to provide a Bid Bond with their RFP proposal. SRTA anticipates the successful Proposer may also be required to provide Payment and Performance Bonds. Specific provisions concerning bonding will be set forth in the Request for Proposal.

## 2 Terms and Conditions/Instructions to Proposers

### 2.1 Deadline for Submission of Qualification Proposals/Late Proposals

Statement of Qualifications (SOQ)/Proposals submitted in response to SRTA Solicitation No. 27-001 must be received by SRTA by the deadlines posted in 1.3 and under "Solicitation Schedule" to ensure that they are evaluated by the Evaluation Committee for this procurement. SOQ/Proposals received after published submission deadlines will not be evaluated.

### 2.2 Format of Statement of Qualification

Each Proposer shall submit its Statement of Qualifications (SOQ) in digital format in Microsoft Word, searchable PDF, or Excel as applicable. The Statement of Qualifications shall consist of all completed and signed Offer Documents and supporting documentation requested in the Statement of Qualifications (SOQ). The SOQ shall be submitted as a **singular file** and clearly marked "Statement of Qualifications," with the Proposer name and SRTA RFQ Number in the file name. *Example: "SRTA RFQ 27-001 [Company Name] Statement of Qualifications"*

The Statement of Qualifications must be submitted to the Issuing Officer by the Submission Deadline in order for the Proposer's submission to be eligible for evaluation and consideration for shortlisting.

If a Proposer submits an affidavit referred to in [Section 2.7 \(Confidential/Proprietary Information\)](#), Proposer must provide one (1) separate electronic copy in searchable PDF format of its proposal labeled "SRTA Solicitation No. 27-001: [Proposer Name] [Copy of Non-Confidential Portion of Proposal]" that excludes any records attached to such affidavit, with no file to exceed 50MB.

All SOQs must be prepared and submitted in accordance with the proposal format and content requirements specified. The included required forms may be completed by using the free Adobe Reader software available at <http://get.adobe.com/reader/>. Proposals must be in English.

As a condition of submission responsiveness, all offer documents that require the signature of Proposer must be signed. Any Contract award made as a result of this solicitation shall bind the Proposer to all of the terms, conditions, and specifications set forth in this RFQ.

### 2.3 Location for Submission of Proposals/Methods of Delivery

SOQs must be submitted exclusively to the Issuing Officer at the email address noted in Section 1.5. **No Hard copies will be accepted.** It is the sole responsibility of the Proposer to ensure that its SOQ is successfully delivered to SRTA by the specified date and time. **SRTA is not responsible for late file transfers/submittals for any reason.** Proposers may email the Issuing Officer at the email address in Section 1.5 in order to acknowledge receipt; however, the completeness or readability of the submittal cannot be confirmed. Due to the potential volume of SOQs received, immediate acknowledgement should not be expected.

Failure to clearly label all files may result in the proposal being discovered and/or opened late. SRTA is not responsible for proposals discovered and/or opened late due to Proposer's failure to mark the proposal as specified. Proposals received after the Proposal Submission Deadline, due to late delivery or late discovery due to Proposer's failure to mark the proposal as specified, may result in SRTA disqualifying the proposal from consideration for Contract award.

## 2.4 Questions

Questions regarding the RFQ must be submitted in writing, defined as being received via letter on official firm/agency letterhead or by electronic mail in accordance with Section 1.5 - Solicitation Schedule. Written questions must be submitted to the attention of the Issuing Officer in accordance with Section 1.5 above.

The final Contract that SRTA expects to award as a result of this RFQ is attached hereto as Attachment 3 to this RFQ.

Please review the Contract and submit any and all questions, clarifications and recommendations to the Issuing Officer by the deadline dates and time specified in this RFQ. All questions, clarifications, and recommendations must be submitted using Attachment 1-Questions and Answers Template.

Should there be any changes made to the Contract as a result of requests received, SRTA shall post a Final Contract via formal addendum. Absent the issuance of a formal addendum containing a Final Contract, Proposers should plan on the Contract terms and conditions as attached hereto as Attachment 3. Answers to all questions received by the applicable deadline will be posted to:

- (1) Georgia Procurement Registry website at [http://ssl.doas.state.ga.us/PRSapp/PR\\_index.jsp](http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp)
- (2) SRTA website at: <https://www.srta.ga.gov/procurement/>

It is the sole responsibility of the Proposer to make itself aware of responses to written questions the Proposer has submitted. Responses to questions are provided as information only and do not in any way alter the contents of the solicitation inclusive of the Scope of Services, the remainder of the RFQ documents, or the Contract. Revisions to the solicitation or to the Contract shall be made only via formally issued addenda. Only such written addenda posted online shall constitute revisions to the solicitation.

## 2.5 Amendments to the Solicitation (Addenda)

SRTA reserves the right to revise or amend the RFQ up to the time set for the submission of proposals. Such revisions and amendments, if any, shall be announced by written addenda to the RFQ. Upon issuance, addenda will be considered part of the RFQ and will prevail over inconsistent or conflicting provisions contained in the original RFQ. Copies of all addenda will be made available for download on:

- (1) Georgia Procurement Registry website at [http://ssl.doas.state.ga.us/PRSapp/PR\\_index.jsp](http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp)
- (2) SRTA website at: <https://www.srta.ga.gov/srta-procurement/>

SRTA will not be responsible for a potential Proposer failing to receive notification of the availability of addenda. **EACH PROPOSER IS INDIVIDUALLY RESPONSIBLE FOR REVIEWING ADDENDA AND ANY OTHER POSTED DOCUMENTS AND MAKING ANY NECESSARY OR APPROPRIATE CHANGES TO THE PROPOSER'S RESPONSE PRIOR TO SUBMISSION.** It is the sole responsibility of each potential Proposer to check the SRTA and Georgia Procurement Registry websites daily for addenda.

If an addendum significantly changes the RFQ, the date set for the submission of proposals may be postponed by such number of days as in the opinion of the SRTA deems suitable to enable potential Proposers to revise their proposals.

Proposers shall acknowledge receipt of all addenda by completing and submitting Offer Document #3 (Acknowledgement of Addenda to RFQ), included as Offer Document #3 in Attachment 2 of this RFQ and described in Section 3.3, as part of its proposal. As with other required documentation, proposals that fail to reference receipt of addenda by inclusion of Offer Document #3 (Acknowledgement of Addenda to RFQ) may be excluded from consideration for a contract award.

## 2.6 Single Response to the Solicitation (Reserved)

## 2.7 Confidential/Proprietary Information

Any and all materials submitted in response to this RFQ are subject to public inspection, pursuant to the provisions of O.C.G.A. § 50-18-70 et seq., Georgia's Open Records Act, upon completion of the RFQ process. **Each Proposer will be responsible for clearly identifying and labeling any records contained in its proposal as "trade secret" that the proposer has reasonably determined meet the definition of "trade secret" under Section 10-1-761(4) of the Georgia Code and that the proposer wishes to be exempt from disclosure under Section 50-18-72(a)(34) of the Georgia Code or any other applicable law.** The Proposer must attach to its proposal an affidavit affirmatively declaring that specific information in the Records constitutes trade secrets pursuant to Article 27 of Chapter 1 of Title 10 of the Georgia Code.

If SRTA receives a request for public disclosure of all or any portion of the materials identified as "trade secrets" in a proposal in accordance with this RFQ, before producing such records in response to such request, SRTA shall notify the Proposer of its intention to produce such records. If SRTA makes a determination that the specifically identified information does not in fact constitute a trade secret, it shall notify the Proposer of its intent to disclose the information within ten (10) Days unless prohibited from doing so by an appropriate court order. If the Proposer wishes to prevent disclosure of the requested Records, the Proposer may file an action in Fulton County Superior Court to obtain an order that the requested records are trade secrets exempt from disclosure. The Proposer shall serve the requestor with a copy of its court filing. If SRTA makes a determination that the specifically identified information does constitute a trade secret, SRTA shall withhold the records, and the requester may file an action in Fulton County Superior Court to obtain an order that the requested records are not trade secrets and are subject to disclosure.

Proposers are advised that their designation as "trade secret" will not be binding on the SRTA or determinative of any issue relating to confidentiality. SRTA will not accept blanket designations that do not clearly identify information and materials that are "trade secrets". SRTA may, in its sole discretion, and subject to compliance with the Open Records Laws and other applicable law, treat the whole of the relevant Section(s)/document(s) that are subject to such a blanket designation as subject to disclosure pursuant to the Open Records Laws.

All material submitted regarding the RFQ becomes the property of the SRTA. Any activity pursuant to this RFQ by any Proposer is governed by all applicable laws, including without limitation, Georgia and Federal antitrust laws. SRTA is not responsible to return to a Proposer any or all of the proposal or other information furnished by that Proposer.

In no event will the State, SRTA, or any of their agents, representatives, consultants, directors, officers or employees be liable to a Proposer or subcontractor for the disclosure of all or a portion of any proposal submitted in response to this RFQ.

Nothing contained in this provision shall modify or amend requirements and obligations imposed on SRTA or any other State entity by the Open Records Laws or other applicable law, and the provisions of the Open Records Laws or other laws shall control if there is a conflict between the procedures described above and the applicable law.

## 2.8 Reserved Rights

In connection with this solicitation, SRTA reserves to itself all rights (which rights are exercisable by SRTA in its sole discretion) available under Procurement Policy and applicable law, including without limitation, with or without cause, and with or without notice, the right to:

- (1) modify the procurement process or documentation described in this RFQ;
- (2) develop the project in any manner that it, in its sole discretion, deems necessary or desirable
- (3) cancel this RFQ, or a subsequent RFQ, in whole or in part at any time prior to the execution by the SRTA of the Contract, without incurring any cost obligations or liabilities except as otherwise expressly stated in this RFQ or the subsequent RFQ;
- (4) issue a new request for proposals after cancellation of this RFQ or a subsequent RFQ;
- (5) not issue an RFQ;
- (6) reject any and all submittals, responses, and proposals at any time;
- (7) reject any and all proposals or any portion of a specific proposal for any reason;
- (8) modify all dates set or projected in this RFQ;
- (9) terminate evaluations of proposals at any time;
- (10) issue amendments, supplements, and modifications to this RFQ;
- (11) appoint Evaluation Committees to review proposals, and seek the assistance of outside technical experts and consultants in Proposal evaluation;
- (12) revise the evaluation criteria or methodology by issuing an amendment prior to the Statement of Qualifications Deadline;
- (13) require confirmation of information furnished by a Proposer, require additional information from a Proposer concerning its proposal and require additional evidence of qualifications or ability to perform the work described in this RFQ;
- (14) down-select to one or multiple Proposers or add additional down-selection phases;
- (15) seek or obtain data from any source that has the potential to improve the understanding and evaluation of the responses to this RFQ;
- (16) add or delete Proposer responsibilities from the information contained in this RFQ;
- (17) negotiate contract terms contemporaneously and /or subsequently with any number of proposers as SRTA deems to be in its best interests;
- (18) waive administrative or minor deficiencies in a Proposal, accept and review a non-conforming proposal or permit clarifications or supplements to a Proposal;
- (19) disqualify any Proposer who changes its proposal without approval;
- (20) disqualify any Proposer from the procurement process for violating any rules or requirements of the procurement specified in this RFQ, the RFQ, applicable law, or any other communication from SRTA;

- (21) add to the shortlist of Proposers any Proposer that submitted a Proposal in order to replace a shortlisted Proposer that withdraws or is disqualified from participation in this procurement;
- (22) (as and solely to the extent applicable) adjust the terms of, or not pursue federal financing programs, or adjust the terms of, or not pursue other financing or public funding for the Project on behalf of the Proposers, or otherwise;
- (23) develop some or all of the Project itself or through another state or local government entity or entities;
- (24) disclose information submitted to SRTA as permitted by applicable law or this RFQ;
- (25) exercise any other right reserved or afforded to SRTA under this RFQ or a subsequent RFQ and applicable law; and
- (26) exercise its discretion in relation to the matters that are the subject of this RFQ as it considers necessary or expedient in light of all circumstances prevailing at the time that SRTA considers to be relevant.

This RFQ does not commit SRTA to enter into the Contract or proceed with the procurement described in this RFQ. SRTA and the State assume no obligations, responsibilities or liabilities, fiscal or otherwise, to reimburse all or part of the costs incurred or alleged to have been incurred by parties considering a response to or responding to this RFQ, or any subsequent RFQ. All such costs shall be borne solely by each Proposer.

Except as provided in this RFQ, in no event will SRTA be bound by, or liable for, any obligations with respect to the Project until such time (if at all) as the Contract has been authorized by SRTA and executed by SRTA, and then, only to the extent provided in the Contract. No Proposer shall have any cause of action against SRTA arising out of the methods by which proposals are evaluated.

SRTA has the sole right to select the successful proposal(s) for contract award(s); to split a contract where allowable; to cancel the solicitation and to advertise for new proposals; to award multiple contracts; or not to award a contract as a result of this RFQ.

SRTA reserves the right to accept any proposal deemed to be in the best interest of SRTA and to waive any irregularity or informality in any proposal that does not prejudice SRTA or other Proposers.

SRTA reserves the right to negotiate with the Proposer whose proposal is considered by SRTA, and in its sole discretion, to be the most advantageous to SRTA.

## 2.9 Protest Policy

SRTA's protest policy shall govern this solicitation, and it can be found at:

<https://www.srta.ga.gov/srta-procurement/>

## 2.10 Minority Business Participation

As an incentive to increase utilization of minority-owned businesses as subcontractors on State purchases, the State of Georgia provides for an income tax adjustment on the state tax return of any company that subcontracts with a State certified minority-owned firm to furnish goods, property, or services to the State of Georgia, including SRTA. The Tax Incentive Program is codified at O.C.G.A. §48-7-38 and is managed by the Georgia Department of Revenue. The requirements of 49 CFR Part 26, Regulations of the U.S. Department of Transportation, apply to this contract. It is SRTA's policy to practice nondiscrimination based on race, color, sex, or national origin in the award or performance of this contract. All companies qualifying under this solicitation are encouraged to submit price quotes. Award of this contract will be conditioned upon satisfying the requirements of this solicitation. These requirements apply to all companies, including those who qualify as a disadvantaged business enterprise (DBE). **SRTA has not established a separate Minority Business or DBE goal for this project.**

## 2.11 Ethical Standards

It is a breach of ethical standards for any SRTA employee to participate directly or indirectly in a procurement when the employee knows:

- (1) The employee or any member of the employee's immediate family has a financial interest pertaining to the procurement;
- (2) A business or organization in which the employee, or any member of the employee's immediate family, has a financial interest pertaining to the procurement; or
- (3) Any other person, business or organization with whom the employee or any member of employee's immediate family is negotiating or has an arrangement concerning prospective employment is involved in the procurement.

SRTA employees are also bound by the Georgia Governor's Executive Order, dated April 1, 2021 for "Establishing a Code of Ethics for Executive Branch Officers and Employees." The Executive Order prohibits SRTA employees, or any person acting on their behalf, from accepting, directly or indirectly, any gift from any person with whom the employee interacts on official SRTA business.

Therefore, it is unlawful for a potential Proposer, or its subcontractors or suppliers, to make gifts or favors to any SRTA employee. It is also unlawful for any SRTA employee to accept any such gift or favor. In addition, any persons acting as members of the Evaluation Committee for this procurement shall, for the purposes of this procurement, be bound by the referenced Executive Order.

Throughout the proposal evaluation and award process and subsequent contract negotiations, Proposers shall not discuss or seek specific information about this procurement, including but not limited to, the contents of submissions, the evaluation process or the contract negotiations, with members of the Evaluation Committee, the SRTA Board of Directors, or SRTA employees other than the Issuing Officer.

## 2.12 ADA Guidelines

SRTA adheres to the guidelines set forth in the Americans with Disabilities Act. Proposers should contact the Issuing Officer at least one Day in advance if they require special arrangements when attending a Hosted site visit (if a Hosted site visit is scheduled).

## 2.13 Audit and Accounting System Requirements

SRTA reserves the right to reject any proposal that does not meet the following requirements:

- 1) Firm(s) should have an accounting system in place to meet the requirements of 48 CFR Part 31; in the case of non-profit organizations, OMB Circular A-122.
- 2) Any firm that currently has an aggregate contract amount exceeding \$250,000 should have submitted their yearly CPA overhead audit.
- 3) Firms should have no significant outstanding deficient audit findings from previous contracts with SRTA or GDOT that have not been resolved.
- 4) The prime contractor is responsible for being reasonably assured that all subcontractors/subconsultants presented as part of the proposed team are similarly in compliance with the above requirements.

## 2.14 Contractual Relationships

SRTA intends to execute a single Contract after the issuance, evaluation and award of the RFP. The selected Contractor's contractual responsibility must solely rest with one firm or legal entity, which shall not be a subsidiary with or affiliate with limited resources. Proposer's Proposal Letter, included as Offer Document #2 of this RFQ, must clearly indicate the firm or entity responsible for contract execution.

## 2.15 Proposal Withdrawal and/or Revision Following Submission

A submitted proposal may be withdrawn and changes to a submitted proposal can be made prior to the Proposal Submission Deadline. In the event a Proposer notes an error or omission in its response which was overlooked prior to submitting the proposal, the Proposer may contact the Issuing Officer to request the proposal withdrawn. Once the Proposer's response is withdrawn, there is no response from the Proposer. Unless and until the Proposer resubmits the received response, SRTA will have no offer from the Proposer to evaluate for possible Contract award. Any resubmission must be received no later than the Proposal submission deadline.

## 2.16 Contractual Provisions (Reserved)

## 2.17 Registered Lobbyists

By submitting a response to this RFQ, the Proposer hereby certifies that the Proposer and its lobbyists are in compliance with the Lobbyist Registration Requirements in accordance with the Georgia Government Transparency and Campaign Finance Commission.

## 2.18 Responsibility for Compliance with Legal Requirements

Proposer's products, services, and facilities shall be in full compliance with any and all applicable federal, state, and local laws, regulations, ordinances, and standards regardless of whether or not they are referred to in this RFQ.

## 2.19 Conditional Proposals

Terms and conditions attached to a proposal by a Proposer and made a condition of Contract execution may render the proposal non-responsive and may be rejected.

## 2.20 SRTA's Right to Request Additional Information-Contractor Responsibility

Prior to award, SRTA must be assured that the selected Contractor has all of the resources to successfully perform under the Contract. This includes, but is not limited to, adequate number of personnel with required skills, availability of appropriate equipment in sufficient quantity to meet the on-going needs of SRTA, financial resources sufficient to complete performance under the Contract, and relevant experience in similar endeavors. If such information is required, the Contractor will be so notified and will submit the information requested within the time requested.

## 2.21 Sales and Use Taxes

SRTA is exempt from paying sales and use taxes.

## 2.22 Proposal Preparation Costs

Each proposal should be prepared simply and economically, avoiding the use of elaborate promotional materials beyond those sufficient to provide a complete proposal. All costs of proposal preparation, attendance at Hosted site visits and/or pre-award meetings, and any other pre-award costs shall be at Proposer's sole cost and expense. SRTA will not provide reimbursement for any costs associated with proposal preparation.

## 2.23 Placeholders

If a Proposer does not include information or materials in its proposal that are described in the relevant submittal requirements in Section 3 because the required information or materials are not applicable to that Proposer, the Proposer must include in the relevant Section in its proposal a statement to the following effect: "Section[s] [ ] of the -----do[es] not apply because [Proposer to insert brief explanation]."

## 2.24 No Geographic Preference

This procurement will be conducted in a manner that prohibits the use of statutorily or administratively imposed in-State or local geographic preferences in evaluation of proposals or award of contracts, except where Federal statutes expressly mandate or encourage geographic preference. This does not pre-empt State licensing laws.

## 2.25 Modification of Proposals

Except at the written request of the SRTA, no proposal may be modified after the deadline for proposal submission.

# 3 Contents and Instructions for Statement of Qualifications (RFQ - Phase 1 Only)

All SOQ/Proposals should include a table of contents with page numbers and sufficient detail to facilitate easy reference to all requested information. Proposer shall not utilize a font size smaller than 10pt font or have margins that are less than 1-inch. To be eligible for evaluation as a complete, responsive proposal in response to SRTA Solicitation No. 27-001 any and all proposals submitted must contain all of the following documents, properly signed by an authorized representative (as applicable), fully completed by the Proposer, and numbered and arranged in the following order:

## 3.1 Complete Proposal Checklist

This document serves as a checklist for Proposers to ensure that their proposal is complete and ready for submission. The document is used by SRTA during the evaluation of responsiveness of proposals.

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. The blank checklist form is attached in Attachment 2 as **Offer Document #1** of this RFQ.

## 3.2 Proposal Letter

This document summarizes the acknowledgements and representations made by and agreed to by the Proposer with regard to its proposal.

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. The blank form is attached in Attachment 2 as **Offer Document #2** of this RFQ.

## 3.3 Acknowledgement of Addenda to the RFQ

This document must be fully completed, signed by an authorized representative, and submitted with the proposal.

If no addenda to the RFP were issued, Proposer must still complete the form and include it in its proposal. The blank form is attached in Attachment 2 as **Offer Document #3** of this RFQ.

## 3.4 Proposer Information Form

This document summarizes key information about the Proposer for the SRTA's assistance and reference during evaluation of the proposals including:

- (1) Contact Information for Proposer
- (2) Corporate Information
- (3) List of references for whom Proposer has performed similar services in the past five years
- (4) References listed on this document as part of the evaluation of proposals will be contacted

(5) If Proposer is a certified DBE, proof of DBE certification must accompany this document.

This document must be fully completed, signed, and submitted with the proposal. The blank form is attached in Attachment 2 as **Offer Document #4** of this RFQ.

### 3.5 Proposer Certifications

This document certifies that the proposal, as provided by the Proposer, will meet or exceed requirements of the RFQ.

This document must be fully completed, signed, and submitted with the proposal. The blank form is attached in Attachment 2 as **Offer Document #5** of this RFQ.

### 3.6 Statement of Qualifications

This document shall be provided as **Offer Document #6** by the Proposer.

Proposer shall detail their ability to perform the Scope of Services set forth in this RFQ, which shall be a narrative description of the Proposer's qualifications and experience. This narrative description shall include the appropriate use of headings and subheadings that address, at minimum, the following elements as defined in Appendix A – Technical Response Guide:

Vendors are invited to submit an RFQ response in accordance with these instructions. Each RFQ response will be evaluated in accordance with the procedures and criteria set forth herein. Each vendor must provide certain information in the prescribed format and limit their response statements as instructed in Appendix A – Technical Response Guide.

Each RFQ response shall provide a straightforward, concise description of the vendor's capabilities to satisfy the requirements of this RFQ. The emphasis of each RFQ response must be on relevance, completeness, and clarity of content.

#### 1. Preparing the RFQ Response

When preparing a response, the vendor must adhere to the following instructions:

- 1.1 Cover Letter:** A cover letter limited to two (2) pages and signed by an officer of the vendor with signature authority to enter into a contract with SRTA, and referencing this RFQ, must be submitted. At a minimum, the cover letter must:
  - a. Indicate the vendor's understanding and acceptance of the terms and conditions of the RFQ and any issued addenda.
  - b. Include the name, phone number, and email address of the Principal in Charge who will serve as the vendor's primary point of contact for this procurement.
- 1.2 Technical Response Format (Appendix A):** Vendors shall complete this document, Appendix A – RFQ Technical Response Guide Sections 2.1 thru 2.12, as the vehicle for responding to the technical qualification requirements of this RFQ.
- 1.3** Vendors may use this Technical Response Guide as the response template and are only required to complete Sections 2.1 thru 2.12.
- 1.4** Narrative responses, explanations, and supporting detail shall be provided directly below each corresponding table, clearly labeled and organized to align with the associated question.
- 1.5** Narrative responses shall not be embedded within tables unless expressly instructed.

## 2. Organization, Formatting, and Page Limits

- 2.1 Responses shall address each qualification item in Appendix A – RFQ Technical Response Guide in the order presented.
- 2.2 The completed Appendix A, inclusive of all narrative responses provided beneath the tables, shall be submitted in Portable Document Format (PDF), preferably searchable.
- 2.3 Responses must be provided in sufficient detail to permit thorough evaluation, while adhering to the page limits stated herein.
- 2.4 RFQ responses shall be submitted in standard 8½” x 11” format, using 1-inch margins on all sides and a minimum font size of 11 points.
- 2.5 Graphics, charts, photographs, and exhibits may be submitted in 11” x 17” format.
- 2.6 All page limits referenced in this RFQ apply to single-sided pages only.

## 3. Overall Page Limitation

The total page limit for the Technical Response is fifteen (15) pages, beginning with the response to Section 3.2 and continuing through all sections, tables, and narrative responses within Appendix A – Technical Response Guide.

**The following items do not count toward the 15-page limit:**

1. Cover letter
2. Cover pages and table of contents
3. Financial statements
4. Copies of PCI-DSS certification or SOC reports
5. Appendix B – Reference Questionnaire: This document will be submitted directly to SRTA for evaluation via the email provided within the document.
6. Offer Documents #1 thru #5, and #7 thru #18

## 4. Experience Verification Instructions as listed in Section 2.1 of Appendix A - TRG

Proposer shall detail their ability to perform the Scope of Services set forth in this RFQ, which shall be a narrative description of the Proposer’s qualifications and experience. This narrative description shall include the appropriate use of headings and subheadings that address, at minimum, the following elements:

1. Name of lead firm and any subconsultants
2. Identification of Project Principal, Primary point of contact for the contract, and Client/ Program Manager (a single person may serve as one or more of these roles)
3. Provide professional qualifications and description of experience for the firm including the project principal and key personnel, including any potential embedded consultants. (A local presence will be required for embedded consultants. Please include any other logistical capabilities for working in proximity to SRTA offices.)
4. Information on the firms’ experience for clients where the services provided were of similar type, function, and complexity. Provide any information that may serve to differentiate the firm(s) from other firms in suitability for the project.
  - a. Describe no more than five (5) and no fewer than three (3) contracts, in order of most relevant to least relevant, which demonstrate the firm's capabilities to perform services for SRTA. For each

contract, the following information should be provided:

- i. Client name, location and dates during which services were performed.
- ii. Clear description of overall project and the specific services performed by your firm including descriptions of with whom the firm worked with at each agency – client staff, and other consultants.
- iii. Exact length of service performed by your firm, and overall project budget.
- iv. Client’s current contact information.

Proposer should label this document as “**Offer Document #6** – Appendix A – Technical Response Guide ” of this RFQ.

### 3.7 Contractor Affidavit under O.C.G.A. § 13-10-91(b)(1)

This document must be fully completed, signed by an authorized representative, notarized, and submitted with the proposal. Blank form is attached in Attachment 2 as **Offer Document #7** of this RFQ.

### 3.8 Sub-Contractor Affidavit

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as **Offer Document #8** of this RFQ.

### 3.9 Subcontractor and DBE Listing Form

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. If any identified subcontractor is a certified DBE, proof of DBE certification must accompany this document. Blank form is attached in Attachment 2 as **Offer Document #9** of this RFQ.

### 3.10 Certification Regarding Debarment and Suspension

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as **Offer Document #10** of this RFQ.

### 3.11 Certification Regarding Lobbying

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as **Offer Document #11** of this RFQ.

### 3.12 Non-Collusion Affidavit

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as **Offer Document #12** of this RFQ.

### 3.13 Anti-Boycott, Divestment and Sanctions Against Israel Certification

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as **Offer Document #13** of this RFQ.

### 3.14 Statement of Responsibility Certification

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as **Offer Document #14** of this RFQ.

### 3.15 Sales and Use Tax Compliance Form

This document must be fully completed, signed by an authorized representative, and submitted with the proposal. Blank form is attached in Attachment 2 as **Offer Document #15** of this RFQ.

### 3.16 Litigation History

This document shall be provided by the Proposer and shall be a narrative description of the Proposer's litigation history. Proposer shall identify and describe material local, state and federal proceedings (legal, administrative, regulatory and otherwise, currently pending against the Proposer or its Principals (to include officers, members, directors and partners) or concluded adversely to the Proposer, or its Principals, within the past ten (10) years.

If Proposer has not been involved in any material litigation within the past ten (10) years, Proposer shall provide a written statement indicating such.

Proposer's response to this Section 3.16 shall be clearly marked in Attachment 2 as **Offer Document #16**.

### 3.17 Termination or Failure to Complete

This document shall be provided by the Proposer and shall be a list of each project on which the Proposer was terminated or failed to complete the delivery of services within the last seven (7) years. For each project, Proposer shall provide: 1.) project name, 2.) project start and end dates, 3.) estimated total contract value (i.e. all work which the Proposer was responsible for), 4.) reason(s) for the contract termination or failure to complete.

Proposer's response to this Section 3.16 shall be clearly marked in Attachment 2 as **Offer Document #17**.

### 3.18 Financial History

This document shall be provided by the Proposer and shall demonstrate sufficient financial strength, resources and capability to finance the work to be performed and complete the Contract in a satisfactory manner as measured by:

Financial references, including name of proposer's primary financial institutions and address, name of contact person and telephone number for each financial institution identified.

Proposer's response to this Section 3.18 shall be clearly marked in Attachment 2 as **Offer Document #18**.

### 3.19 Contents and Instructions for Phase 2 - TBD

Only shortlisted firms will be asked for this information. The Selection Committee will use RFQ details to evaluate firms and send RFPs only to those shortlisted. (**NOTE:** Scores from Phase I - RFQ will not be carried forward to Phase II - RFP).

## 4 Proposal Evaluation Process

The following section describes the process by which proposals will be evaluated and a selection made for a potential award. A Selection Committee will be established to review and evaluate proposals submitted in response to this RFQ and make a recommendation for award to the Executive Director.

### 4.1 Determination of Responsiveness

SOQ/Proposals will be analyzed for conformance with the instructions and requirements of the RFQ as identified within this RFQ in Section 3 and Section 4. Any proposal found to be non-responsive may be withdrawn from further consideration. Only those proposals found to be responsive will be evaluated as described below.

## 4.2 Evaluation of SOQ/Proposals

The Evaluation Selection Committee will evaluate all responsive proposals as described below:

- (1) **Phase 1 – Statement of Qualifications Evaluation.** During the first phase of the evaluation, the Selection Committee will have access to all Statements of Qualifications. Using the evaluation criteria that follow in Section 4.2.1, the Selection Committee will evaluate all responsive SOQ/proposals based on the Phase 1 evaluation criteria as outlined below and rank the proposals.
  - (a) **The Completeness of the Statement of Qualifications shall be a Pass or Fail.** Only those Proposers that have been determined by the Evaluation Committee to have submitted all required documentation shall receive a “PASS”. Any Proposer providing an incomplete submittal package will receive a “FAIL” and will not be evaluated further. Any Proposer that receive a “FAIL” in any category will not be evaluated further.
  - (b) Up to three (3) of the highest-ranking proposers shall advance to the next phase in the evaluation process.
  - (c) **Phase 2 – By Shortlist Notification Only – RFP/Technical Approach/Interviews.** SRTA will issue the RFP and request a Technical Approach of the three (3) shortlist finalist firms. SRTA reserves the right to request a presentation/interview on any project/contract as determined in its best interests; however, this additional requirement shall typically be reserved for the most complex projects. Each finalist firm shall be notified in writing and informed of the Technical Approach due date. Any additional detailed Technical Approach instructions and requirements beyond that provided in Section 3 for the Finalists will be provided in the Finalist Notification
    - a. The dates and nature of the interview requirements will be communicated to the invited Finalists.
    - b. Should SRTA elect not to conduct oral presentations/interviews, no points will be awarded to any Finalist for the presentation/interview.

#### 4.2.1 Evaluation Criteria

RFQ/SOQ/Proposals will be evaluated based on the following criteria and point valued assigned below:

SRTA intends to award a single contract for the requested services through a two-step procurement process consisting of this RFQ, followed by a Request for Proposals (RFP). The RFQ phase of the procurement will establish a shortlist of the most qualified vendors (Shortlist) based on the evaluation criteria set forth herein in Section 3 and Section 4. Only vendors shortlisted during the RFQ phase can participate in the RFP portion of the procurement. Only those Proposers on the shortlist will be eligible to submit a proposal in response to SRTA’s Customer Service Staffing Optimization RFP. The scoring from the RFQ phase will not be carried over to the RFP phase.

*Table 1: Scoring Criteria*

Response Element	Section Reference	Maximum Score
Experience Verification	Technical Response Guide 2.1	Pass/Fail
References	Technical Response Guide 2.2	Pass/Fail
Financial Stability	Technical Response Guide 2.3	Pass/Fail
PCI Compliance	Technical Response Guide 2.4	Pass/Fail
Security Compliance (NIST SP 800-53)	Technical Response Guide 2.5	Pass/Fail
Resource Capacity and Implementation Readiness	Technical Response Guide 2.6	Pass/Fail
Advanced Escalations and Regulatory Complaint Management	Technical Response Guide 2.7	25
Litigation History	Technical Response Guide 2.8	25
Quality & Training Integration	Technical Response Guide 2.9	25
Customer Experience and Customer Relationship Management	Technical Response Guide 2.10	25
<b>Total</b>		<b>100</b>

## PART 2 – SCOPE OF SERVICES

### 5 Scope of Services

The Scope of Services contained within the forthcoming RFP is expected to include support of the following:

1. **Customer Service Operations**, where the vendor shall staff, manage, and operate customer service functions across all SRTA-approved customer access channels, including phone, IVR, email, mail, live chat, and case management, to support customer inquiries, account management, account management, payment assistance, dispute resolution, and customer education in accordance with SRTA policies and service levels.
2. **Payment Processing and Financial Support**, where the vendor shall support SRTA's payment processing operations by securely handling mailed payments (using the SRTA-provided BOS), administering SRTA-approved payment plans, maintaining audit trails and reconciliations, and supporting collections-related escalations and payment acceptance in accordance with SRTA business rules, without performing collections activities.
3. **Case Management and Dispute Resolution**, where the vendor shall manage the full lifecycle of customer inquiries, requests, and disputes within the SRTA-provided Back Office System (BOS), including documentation, investigation, resolution, customer response, and escalation, in accordance with SRTA-approved SOPs, evaluation criteria, and service level agreements.
4. **Mail Processing and Correspondence Support**, where the vendor shall implement and maintain a secure, auditable workflow for all incoming customer correspondence, including daily logging, scanning, manual image upload to the appropriate customer account, secure retention, routing, and timely response in accordance with SRTA service level requirements.
5. **Call Center and Live Chat Services**, where the vendor shall provide a fully staffed, multilingual call center and live chat operation that meets SRTA service level expectations, utilizes SRTA-approved scripts and knowledge content, monitors performance metrics, and supports continuous improvement through observed customer interaction trends.
6. **Quality Assurance and Continuous Improvement**, where the vendor shall maintain a comprehensive quality assurance program that evaluates all customer interaction channels for accuracy, professionalism, compliance, and customer satisfaction, and uses audit results to drive coaching, retraining, and continuous operational improvement.
7. **Training and Knowledge Management**, where the vendor shall support training delivery and ongoing knowledge management for all CSC personnel using SRTA-approved materials, maintain a centralized and searchable knowledge management system with version control, and implement retraining and performance improvement programs as required.
8. **Staffing, Personnel Management, and Facilities**, where the vendor shall recruit, onboard, manage, schedule, and retain qualified personnel and maintain facilities and staffing models sufficient to meet SRTA's operational demands, service level requirements, and projected transaction volumes.
9. **Project Management, Reporting, and Governance**, where the vendor shall provide structured project management, documentation control, reporting, and participation in SRTA governance processes during

implementation and ongoing operations in accordance with SRTA schedules, reporting standards, and oversight requirements.

- 10. **Coordination with SRTA and Third Parties**, where the vendor shall coordinate closely with SRTA staff and SRTA-contracted system providers to ensure seamless operations, data integrity, issue resolution, and consistent customer experience across all customer service platforms.

SRTA’s CSC operations and support provider shall be responsible for providing all necessary facilities, hardware, software, infrastructure, and technical, administrative, and operational staffing to meet all requirements of the Scope of Services.

### 5.1 Operational Volume Overview

The table below summarizes the operational volume of payment plans, cases, calls, chats, violations invoices, and mail received and processed between February and December 2025. Detailed data will be provided as an appendix to the RFP.

Table 2: Operational Volume Counts

Payment Plans			
<b>Total Payment Plans</b>	Low hundreds		
Case Management			
	<b>Non-Dispute</b>	<b>Dispute</b>	<b>Total</b>
<b>Total Cases Created</b>	57,580	8,428	66,008
Customer Service Call Center			
	<b>English</b>	<b>Spanish</b>	<b>Total</b>
<b>Total Calls Offered</b>	216,887	8,890	225,777
LiveChat			
	<b>English</b>	<b>Spanish</b>	<b>Total</b>
<b>Total Chats Offered</b>	32,312	411	32,723
Invoice Audits			
<b>Total Violation Notices Audited</b>	1,202,443		
Mail Processing			
<b>Total Inbound Mail</b>	36,402		

## 6 Attachments

The following are provided as separate attachments:

Attachment 1 – RFQ Question and Answer Template

Attachment 2 – RFQ Offer Documents

Attachment 3 – **Reserved** – Contract Draft for RFP

Attachment 4 – Appendix A Technical Response Guide

Attachment 5 - Appendix B References Questionnaire

Attachment 6 – Appendix C Operational Transaction Count Summary