



**May 11, 2026**

**To:** Members of the Board of Directors

**From:** Darrell E. Johnson, Chief Executive Officer

**Subject:** Approval to Release Request for Proposals for an Enterprise Asset Management Phase 2 Project Supporting Contracted Services

**Overview**

The Orange County Transportation Authority seeks to release a request for proposals to competitively procure professional services for the Phase 2 of its Octave Attune Enterprise Asset Management system (formerly Hexagon Enterprise Asset Management) expansion. This request for proposals will address new maintenance and inventory operations requirements for contracted services. The selected firm will provide a scalable framework that meets the Orange County Transportation Authority's operational and regulatory requirements, as defined through the scope of work.

**Recommendations**

- A. Approve the proposed evaluation criteria and weightings for Request for Proposals 250192 to select a firm for the expansion of the existing Enterprise Asset Management system to support contracted services.
- B. Approve the release of Request for Proposals 250192 for the expansion of the existing Enterprise Asset Management system to support contracted services.

**Discussion**

The Orange County Transportation Authority (OCTA) owns and maintains a variety of assets including five maintenance and operating bases, one park-and-ride facility, six multimodal transportation centers, both revenue and non-revenue vehicles, and rolling stock assets. In February 2021, OCTA's Board of Directors (Board) approved an agreement for the implementation of an Enterprise Asset Management (EAM) system to support OCTA's maintenance

and related inventory processes for directly operated service assets. This system was moved into production in September 2025.

This RFP addresses new OCTA contractual requirements requiring contracted service providers to utilize OCTA systems to track maintenance activities and related inventory for OCTA-owned assets. These requirements were introduced after the initiation of the original EAM project and were not part of the initial project scope. Incorporating these requirements into the original project was not feasible without delaying system deployment and increasing implementation risk. As a result, Phase 2 is proposed as a separate effort to address these requirements in a structured and scalable manner.

The objective of this RFP is to enhance the platform's ability to support a multi-business line environment while maintaining enterprise-wide governance, audit controls, security standards, and system integrations.

System requirements were developed collaboratively across departments to ensure alignment with OCTA's long-term EAM strategy. A competitive procurement process will be used to identify a qualified firm with demonstrated experience implementing enterprise-scale EAM solutions within a public transportation environment.

### ***Procurement Approach***

The OCTA Board-approved procurement policies and procedures require that the Board approve all request for proposals (RFP) over \$1,000,000, as well as approve the evaluation criteria and weightings. Staff is submitting for Board approval the draft RFP and evaluation criteria and weightings, which will be used to evaluate proposals received in response to the RFP.

The recommended evaluation criteria and weightings are as follows:

- |                                     |            |
|-------------------------------------|------------|
| • Qualifications of the Firm        | 25 percent |
| • Staffing and Project Organization | 20 percent |
| • Work Plan                         | 30 percent |
| • Cost and Price                    | 25 percent |

Several factors were considered in developing the evaluation criteria weightings. Qualifications of the firm criterion is weighted at 25 percent to ensure the firm has prior experience with the development, implementation, maintenance, and support of an EAM system as outlined in the scope for work. Staffing and project

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organization criterion is weighted at 20 percent to ensure the firm's staff have the requisite technical expertise for completing a project of similar size and scope. Work plan is weighted at 30 percent to ensure the firm demonstrates its understanding and approach to meeting the requirements set forth in the scope of work. Cost and price criterion is weighted at 25 percent to ensure OCTA receives value for the services provided.

The contract term for this procurement will be for a two-year term. The total cost for the project is anticipated to be approximately \$1,500,000.

This RFP will be released upon Board approval of these recommendations.

**Fiscal Impact**

This project is included in the proposed OCTA Fiscal Year 2026-27 Budget and will be funded by Information Systems Account No. 1285-9028-IX080-0R5 and is funded through the general fund.

***Summary***

Board approval is requested to release Request for Proposals 250192 to select a firm to provide services for Phase 2 of OCTA's EAM system implementation, as well as approve the proposed evaluation criteria and weightings.

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***Attachment***

- A. Draft Request for Proposals (RFP) 250192 Enterprise Asset Management Phase 2

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