NORTHBRIDGE TRANSIT AUTHORITY

Technical Proposal — Copperline Integration Partners LLC

Fleet Telematics and Depot Records Modernization

Solicitation	RFP-2026-0417
Project	Fleet Telematics and Depot Records Modernization
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This document is fictional and was generated for software demonstration and end-to-end testing. It is not a real solicitation, no real vendor is named, and no submission is requested. All names, addresses, prices and events are invented.

1 Executive Summary

Copperline Integration Partners LLC proposes a phased modernization of the Authority's depot records and fleet telematics data handling. The approach uses a single indexing layer over existing repositories, keeps original files read-only, and provides offline-capable indexing at the two depots with intermittent connectivity. The program is sized to complete transition within 120 days of contract execution.

The proposal is organized to follow the solicitation's evaluation criteria. Section 3 describes the technical approach; Section 4 maps requirements to responses; Section 5 provides the schedule; Section 6 describes staffing; Section 7 lists risks and mitigations. Pricing is provided in a separate volume.

A Certificate of Insurance and the required Bid Bond and Performance Bond will be provided in the insurance volume before contract execution. The proposed team has delivered comparable programs for transit, aviation and municipal clients. Named key personnel are available at the percentages stated in Section 6 and have committed to the engagement for the base period.

2 Understanding of Requirements

The Authority's environment combines paper records, shared folders and legacy systems with inconsistent naming. The program must therefore start with discovery and a controlled sample, not with bulk migration. Our approach inventories first, normalizes metadata second, and migrates in batches with reconciliation at each cutover.

- Original records remain read-only; all derived indexes and renditions are separable.
- Offline mode is a first-class requirement at Riverside and Meadowbrook depots.
- Access controls follow record series, not folder structure, because the current folders mix series.
- Retention rules are configuration, not code, so the Authority can change them without a release.
- Reporting must reconcile source counts to indexed counts at every phase gate.

3 Technical Approach

3.1 Data retention and records disposition

Requirements related to data retention and records disposition are stated in the referenced section. Bidders shall indicate, for each requirement, whether it is met by the proposed solution, met through configuration, delivered by a subcontractor or not met. Exceptions shall be listed in the Compliance Matrix and priced separately where applicable.

The Authority will evaluate data retention and records disposition against the criteria in the evaluation section. Responses should be specific about sequencing, dependencies and assumptions. Where the Bidder proposes an alternative, the alternative shall be described in full and accompanied by a statement of its effect on schedule, cost and service levels.

Experience with data retention and records disposition on comparable transit or public-sector engagements shall be summarized in no more than two pages. The summary shall identify the client, the period of performance, the contract value and the results actually achieved. References may be contacted at the Authority's discretion.

Requirements R-3.1.1 to R-3.1.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.1.1 — The Bidder shall provide an escalation path and response times for unresolved issues for data retention and records disposition.

2. R-3.1.2 — The Bidder shall provide audit evidence retained for the contract term plus three years for data retention and records disposition.
3. R-3.1.3 — The Bidder shall provide named backup staff and a current cross-training record for data retention and records disposition.

3.2 Depot network coverage and offline operation

The Authority will evaluate depot network coverage and offline operation against the criteria in the evaluation section. Responses should be specific about sequencing, dependencies and assumptions. Where the Bidder proposes an alternative, the alternative shall be described in full and accompanied by a statement of its effect on schedule, cost and service levels.

Experience with depot network coverage and offline operation on comparable transit or public-sector engagements shall be summarized in no more than two pages. The summary shall identify the client, the period of performance, the contract value and the results actually achieved. References may be contacted at the Authority's discretion.

For depot network coverage and offline operation, the Bidder shall propose a quality assurance method, including sampling approach, acceptance criteria and the process for correcting defects. The method shall be applied during transition and throughout the contract term, and results shall be reported to the Contract Administrator each month.

Requirements R-3.2.1 to R-3.2.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.2.1 — The Bidder shall provide a test plan covering normal operation, degraded mode and recovery for depot network coverage and offline operation.
2. R-3.2.2 — The Bidder shall provide a written knowledge-transfer session before each phase acceptance for depot network coverage and offline operation.
3. R-3.2.3 — The Bidder shall provide a change log with version numbers, approvers and effective dates for depot network coverage and offline operation.

3.3 Integration with the fare and scheduling systems

Experience with integration with the fare and scheduling systems on comparable transit or public-sector engagements shall be summarized in no more than two pages. The summary shall identify the client, the period of performance, the contract value and the results actually achieved. References may be contacted at the Authority's discretion.

For integration with the fare and scheduling systems, the Bidder shall propose a quality assurance method, including sampling approach, acceptance criteria and the process for correcting defects. The method shall be applied during transition and throughout the contract term, and results shall be reported to the Contract Administrator each month.

The Authority expects integration with the fare and scheduling systems to be addressed within the total not-to-exceed price. If additional effort is required, the Bidder shall state the estimated level of effort, the basis for the estimate and the proposed pricing basis in the Price Proposal.

Requirements R-3.3.1 to R-3.3.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.3.1 — The Bidder shall provide a reconciliation of source records to indexed records at each cutover for integration with the fare and scheduling systems.
2. R-3.3.2 — The Bidder shall provide a documented procedure with a named owner and a stated review cycle for integration with the fare and scheduling systems.

3. R-3.3.3 — The Bidder shall provide a sample-based quality check with a defined acceptance threshold for integration with the fare and scheduling systems.

3.4 Role-based access control and audit logging

For role-based access control and audit logging, the Bidder shall propose a quality assurance method, including sampling approach, acceptance criteria and the process for correcting defects. The method shall be applied during transition and throughout the contract term, and results shall be reported to the Contract Administrator each month.

The Authority expects role-based access control and audit logging to be addressed within the total not-to-exceed price. If additional effort is required, the Bidder shall state the estimated level of effort, the basis for the estimate and the proposed pricing basis in the Price Proposal.

All work related to role-based access control and audit logging shall comply with the Authority's records retention policy and with applicable state and federal requirements. The Bidder shall not remove, alter or transmit Authority records except as authorized in writing by the Contract Administrator.

Requirements R-3.4.1 to R-3.4.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.4.1 — The Bidder shall provide a monthly report to the Contract Administrator with exceptions listed for role-based access control and audit logging.
2. R-3.4.2 — The Bidder shall provide an escalation path and response times for unresolved issues for role-based access control and audit logging.
3. R-3.4.3 — The Bidder shall provide audit evidence retained for the contract term plus three years for role-based access control and audit logging.

3.5 Disaster recovery and business continuity

The Authority expects disaster recovery and business continuity to be addressed within the total not-to-exceed price. If additional effort is required, the Bidder shall state the estimated level of effort, the basis for the estimate and the proposed pricing basis in the Price Proposal.

All work related to disaster recovery and business continuity shall comply with the Authority's records retention policy and with applicable state and federal requirements. The Bidder shall not remove, alter or transmit Authority records except as authorized in writing by the Contract Administrator.

The proposed schedule for disaster recovery and business continuity shall be provided as a milestone chart with dependencies, review points and the Authority's required response times. Durations shall be stated in calendar days and shall account for Authority review periods.

Requirements R-3.5.1 to R-3.5.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.5.1 — The Bidder shall provide named backup staff and a current cross-training record for disaster recovery and business continuity.
2. R-3.5.2 — The Bidder shall provide a test plan covering normal operation, degraded mode and recovery for disaster recovery and business continuity.
3. R-3.5.3 — The Bidder shall provide a written knowledge-transfer session before each phase acceptance for disaster recovery and business continuity.

3.6 Bidder training and knowledge transfer

All work related to bidder training and knowledge transfer shall comply with the Authority's records retention policy and with applicable state and federal requirements. The Bidder shall not remove, alter or transmit Authority records except as authorized in writing by the Contract Administrator.

The proposed schedule for bidder training and knowledge transfer shall be provided as a milestone chart with dependencies, review points and the Authority's required response times. Durations shall be stated in calendar days and shall account for Authority review periods.

The Bidder shall identify the key personnel responsible for bidder training and knowledge transfer, their relevant experience and the percentage of time each will devote to the engagement. Substitutions after award require the Contract Administrator's written approval.

Requirements R-3.6.1 to R-3.6.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.6.1 — The Bidder shall provide a change log with version numbers, approvers and effective dates for bidder training and knowledge transfer.
2. R-3.6.2 — The Bidder shall provide a reconciliation of source records to indexed records at each cutover for bidder training and knowledge transfer.
3. R-3.6.3 — The Bidder shall provide a documented procedure with a named owner and a stated review cycle for bidder training and knowledge transfer.

3.7 Transition and cutover planning

The proposed schedule for transition and cutover planning shall be provided as a milestone chart with dependencies, review points and the Authority's required response times. Durations shall be stated in calendar days and shall account for Authority review periods.

The Bidder shall identify the key personnel responsible for transition and cutover planning, their relevant experience and the percentage of time each will devote to the engagement. Substitutions after award require the Contract Administrator's written approval.

Risks associated with transition and cutover planning shall be listed with likelihood, impact and mitigation. The Authority will consider whether the proposed mitigation is proportionate and whether the Bidder has allocated responsibility clearly among itself, its subcontractors and the Authority.

Requirements R-3.7.1 to R-3.7.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.7.1 — The Bidder shall provide a sample-based quality check with a defined acceptance threshold for transition and cutover planning.
2. R-3.7.2 — The Bidder shall provide a monthly report to the Contract Administrator with exceptions listed for transition and cutover planning.
3. R-3.7.3 — The Bidder shall provide an escalation path and response times for unresolved issues for transition and cutover planning.

3.8 Cybersecurity controls and incident reporting

The Bidder shall identify the key personnel responsible for cybersecurity controls and incident reporting, their relevant experience and the percentage of time each will devote to the engagement. Substitutions after award require the Contract Administrator's written approval.

Risks associated with cybersecurity controls and incident reporting shall be listed with likelihood, impact and mitigation. The Authority will consider whether the proposed mitigation is proportionate and whether the Bidder has allocated responsibility clearly among itself, its subcontractors and the Authority.

Documentation for cybersecurity controls and incident reporting shall be delivered in editable and searchable formats, indexed by requirement and updated at each major release. The Authority will not accept image-only documentation as the sole deliverable.

Requirements R-3.8.1 to R-3.8.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.8.1 — The Bidder shall provide audit evidence retained for the contract term plus three years for cybersecurity controls and incident reporting.
2. R-3.8.2 — The Bidder shall provide named backup staff and a current cross-training record for cybersecurity controls and incident reporting.
3. R-3.8.3 — The Bidder shall provide a test plan covering normal operation, degraded mode and recovery for cybersecurity controls and incident reporting.

3.9 Accessibility conformance for published documents

Risks associated with accessibility conformance for published documents shall be listed with likelihood, impact and mitigation. The Authority will consider whether the proposed mitigation is proportionate and whether the Bidder has allocated responsibility clearly among itself, its subcontractors and the Authority.

Documentation for accessibility conformance for published documents shall be delivered in editable and searchable formats, indexed by requirement and updated at each major release. The Authority will not accept image-only documentation as the sole deliverable.

Training for accessibility conformance for published documents shall include instructor-led sessions at Authority facilities, a recorded reference module and written quick-reference guides. The Bidder shall provide training materials at least ten business days before the first session.

Requirements R-3.9.1 to R-3.9.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.9.1 — The Bidder shall provide a written knowledge-transfer session before each phase acceptance for accessibility conformance for published documents.
2. R-3.9.2 — The Bidder shall provide a change log with version numbers, approvers and effective dates for accessibility conformance for published documents.
3. R-3.9.3 — The Bidder shall provide a reconciliation of source records to indexed records at each cutover for accessibility conformance for published documents.

3.10 Invoicing, payment milestones and cost reporting

Documentation for invoicing, payment milestones and cost reporting shall be delivered in editable and searchable formats, indexed by requirement and updated at each major release. The Authority will not accept image-only documentation as the sole deliverable.

Training for invoicing, payment milestones and cost reporting shall include instructor-led sessions at Authority facilities, a recorded reference module and written quick-reference guides. The Bidder shall provide training materials at least ten business days before the first session.

The Bidder shall demonstrate invoicing, payment milestones and cost reporting in a scripted walkthrough during the shortlist interview. The walkthrough shall use the Bidder's proposed production configuration and synthetic Authority

data supplied in advance by the Authority.

Requirements R-3.10.1 to R-3.10.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.10.1 — The Bidder shall provide a documented procedure with a named owner and a stated review cycle for invoicing, payment milestones and cost reporting.
2. R-3.10.2 — The Bidder shall provide a sample-based quality check with a defined acceptance threshold for invoicing, payment milestones and cost reporting.
3. R-3.10.3 — The Bidder shall provide a monthly report to the Contract Administrator with exceptions listed for invoicing, payment milestones and cost reporting.

3.11 Service levels and remedy credits

Training for service levels and remedy credits shall include instructor-led sessions at Authority facilities, a recorded reference module and written quick-reference guides. The Bidder shall provide training materials at least ten business days before the first session.

The Bidder shall demonstrate service levels and remedy credits in a scripted walkthrough during the shortlist interview. The walkthrough shall use the Bidder's proposed production configuration and synthetic Authority data supplied in advance by the Authority.

Copperline Integration Partners LLC shall describe its proposed approach to service levels and remedy credits in sufficient detail for the Authority to evaluate feasibility, staffing and risk. The response shall identify the roles responsible, the systems involved and the measurable outcomes the Bidder commits to. A restatement of the specification without an implementation description will receive a lower score.

Requirements R-3.11.1 to R-3.11.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.11.1 — The Bidder shall provide an escalation path and response times for unresolved issues for service levels and remedy credits.
2. R-3.11.2 — The Bidder shall provide audit evidence retained for the contract term plus three years for service levels and remedy credits.
3. R-3.11.3 — The Bidder shall provide named backup staff and a current cross-training record for service levels and remedy credits.

3.12 Spare parts, consumables and warranty coverage

The Bidder shall demonstrate spare parts, consumables and warranty coverage in a scripted walkthrough during the shortlist interview. The walkthrough shall use the Bidder's proposed production configuration and synthetic Authority data supplied in advance by the Authority.

Copperline Integration Partners LLC shall describe its proposed approach to spare parts, consumables and warranty coverage in sufficient detail for the Authority to evaluate feasibility, staffing and risk. The response shall identify the roles responsible, the systems involved and the measurable outcomes the Bidder commits to. A restatement of the specification without an implementation description will receive a lower score.

Requirements related to spare parts, consumables and warranty coverage are stated in the referenced section. Bidders shall indicate, for each requirement, whether it is met by the proposed solution, met through configuration, delivered by a subcontractor or not met. Exceptions shall be listed in the Compliance Matrix and priced separately where applicable.

Requirements R-3.12.1 to R-3.12.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.12.1 — The Bidder shall provide a test plan covering normal operation, degraded mode and recovery for spare parts, consumables and warranty coverage.
2. R-3.12.2 — The Bidder shall provide a written knowledge-transfer session before each phase acceptance for spare parts, consumables and warranty coverage.
3. R-3.12.3 — The Bidder shall provide a change log with version numbers, approvers and effective dates for spare parts, consumables and warranty coverage.

3.13 Document intake, indexing and quality sampling

Copperline Integration Partners LLC shall describe its proposed approach to document intake, indexing and quality sampling in sufficient detail for the Authority to evaluate feasibility, staffing and risk. The response shall identify the roles responsible, the systems involved and the measurable outcomes the Bidder commits to. A restatement of the specification without an implementation description will receive a lower score.

Requirements related to document intake, indexing and quality sampling are stated in the referenced section. Bidders shall indicate, for each requirement, whether it is met by the proposed solution, met through configuration, delivered by a subcontractor or not met. Exceptions shall be listed in the Compliance Matrix and priced separately where applicable.

The Authority will evaluate document intake, indexing and quality sampling against the criteria in the evaluation section. Responses should be specific about sequencing, dependencies and assumptions. Where the Bidder proposes an alternative, the alternative shall be described in full and accompanied by a statement of its effect on schedule, cost and service levels.

Requirements R-3.13.1 to R-3.13.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.13.1 — The Bidder shall provide a reconciliation of source records to indexed records at each cutover for document intake, indexing and quality sampling.
2. R-3.13.2 — The Bidder shall provide a documented procedure with a named owner and a stated review cycle for document intake, indexing and quality sampling.
3. R-3.13.3 — The Bidder shall provide a sample-based quality check with a defined acceptance threshold for document intake, indexing and quality sampling.

3.14 Fleet telematics data ingestion and normalization

Requirements related to fleet telematics data ingestion and normalization are stated in the referenced section. Bidders shall indicate, for each requirement, whether it is met by the proposed solution, met through configuration, delivered by a subcontractor or not met. Exceptions shall be listed in the Compliance Matrix and priced separately where applicable.

The Authority will evaluate fleet telematics data ingestion and normalization against the criteria in the evaluation section. Responses should be specific about sequencing, dependencies and assumptions. Where the Bidder proposes an alternative, the alternative shall be described in full and accompanied by a statement of its effect on schedule, cost and service levels.

Experience with fleet telematics data ingestion and normalization on comparable transit or public-sector engagements shall be summarized in no more than two pages. The summary shall identify the client, the period of performance, the contract value and the results actually achieved. References may be contacted at the Authority's discretion.

Requirements R-3.14.1 to R-3.14.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.14.1 — The Bidder shall provide a monthly report to the Contract Administrator with exceptions listed for fleet telematics data ingestion and normalization.
2. R-3.14.2 — The Bidder shall provide an escalation path and response times for unresolved issues for fleet telematics data ingestion and normalization.
3. R-3.14.3 — The Bidder shall provide audit evidence retained for the contract term plus three years for fleet telematics data ingestion and normalization.

3.15 Records retention schedules and legal holds

The Authority will evaluate records retention schedules and legal holds against the criteria in the evaluation section. Responses should be specific about sequencing, dependencies and assumptions. Where the Bidder proposes an alternative, the alternative shall be described in full and accompanied by a statement of its effect on schedule, cost and service levels.

Experience with records retention schedules and legal holds on comparable transit or public-sector engagements shall be summarized in no more than two pages. The summary shall identify the client, the period of performance, the contract value and the results actually achieved. References may be contacted at the Authority's discretion.

For records retention schedules and legal holds, the Bidder shall propose a quality assurance method, including sampling approach, acceptance criteria and the process for correcting defects. The method shall be applied during transition and throughout the contract term, and results shall be reported to the Contract Administrator each month.

Requirements R-3.15.1 to R-3.15.3

The following minimum requirements apply in addition to the narrative above:

1. R-3.15.1 — The Bidder shall provide named backup staff and a current cross-training record for records retention schedules and legal holds.
2. R-3.15.2 — The Bidder shall provide a test plan covering normal operation, degraded mode and recovery for records retention schedules and legal holds.
3. R-3.15.3 — The Bidder shall provide a written knowledge-transfer session before each phase acceptance for records retention schedules and legal holds.

4 Compliance Matrix

The matrix below summarizes compliance. 'Complies' means the requirement is met by the proposed solution without customization; 'Configure' means met through configuration; 'Exception' means not met as written and is explained in the referenced section.

Req.	Requirement	Response	Reference
R-01	Data retention and records disposition	Complies	Section 3.2
R-02	Depot network coverage and offline operation	Complies	Section 3.3
R-03	Integration with the fare and scheduling systems	Complies	Section 3.4
R-04	Role-based access control and audit logging	Complies	Section 3.5
R-05	Disaster recovery and business continuity	Configure	Section 3.6
R-06	Bidder training and knowledge transfer	Complies	Section 3.7
R-07	Transition and cutover planning	Complies	Section 3.8
R-08	Cybersecurity controls and incident reporting	Complies	Section 3.9

Req.	Requirement	Response	Reference
R-09	Accessibility conformance for published documents	Complies	Section 3.10
R-10	Invoicing, payment milestones and cost reporting	Configure	Section 3.11
R-11	Service levels and remedy credits	Complies	Section 3.12
R-12	Spare parts, consumables and warranty coverage	Complies	Section 3.13
R-13	Document intake, indexing and quality sampling	Complies	Section 3.14
R-14	Fleet telematics data ingestion and normalization	Complies	Section 3.15
R-15	Records retention schedules and legal holds	Configure	Section 3.1
R-16	Subcontractor management and MWBE reporting	Complies	Section 3.2
R-17	Change control and configuration management	Complies	Section 3.3
R-18	Acceptance testing and defect resolution	Complies	Section 3.4

5 Schedule and Milestones

Phase	Duration	Key deliverable
Discovery and inventory	Weeks 1-4	Inventory report and migration plan
Pilot at Central Depot	Weeks 5-10	Pilot acceptance and lessons learned
Rollout, four depots	Weeks 11-18	Per-depot acceptance certificates
Rollout, remaining depots	Weeks 19-24	Final acceptance package
Telematics integration	Weeks 9-22	Normalized feed and reconciliation report
Training and transition	Weeks 20-26	Training completion and support handover

The schedule assumes Authority review within five business days at each gate. Delays in review extend the schedule day for day. The Bidder will provide a recovery plan if any phase slips more than ten business days.

6 Staffing and Key Personnel

Role	Name (fictional)	Allocation	Responsibility
Engagement Director	Owen Castellanos	20%	Executive accountability and escalation
Program Manager	Renata Osei	100%	Schedule, budget, reporting
Solution Architect	Hugo Lindqvist	60%	Architecture and integration design
Migration Lead	Amara Diallo	100%	Inventory, mapping, reconciliation
Training Lead	Peter Voss	40%	Curriculum and delivery
Security Lead	Nina Petrov	30%	Access controls and incident response

7 Risks and Mitigations

Risk	Likelihood	Impact	Mitigation
Record inventory larger than estimated	Medium	Medium	Sampling-based estimate and volume bands
Intermittent depot connectivity	High	High	Offline queue with automatic reconciliation
Legacy system interface changes	Medium	High	Adapter layer and contract change control
Staff availability during rollout	Medium	Medium	Named backups and cross-training
Data classification errors	Low	High	Series-level review with Authority sign-off

End of technical proposal. Synthetic demo data — not a real solicitation.