

**Fall 2011  
Grant Management Training**



**CAPITAL PROCUREMENT –  
Focus on Vehicles**



## Vehicle Purchases Overview

- Vehicle Purchases
- Review Forms and Samples
- Brief Overviews of Equipment and Facility Projects

3

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## Vehicle Purchases: RFPs

- Agencies must use State price agreements to acquire vehicles unless pre-approved by ODOT PTD
- If approved, the agency must conduct an open competitive bid process, usually via a Request for Proposals (RFP)
  - The RFP must be approved by PTD prior to release

4

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## Vehicle Purchases: RFPs

- Follow local adopted purchasing policies. Must meet State procurement laws if not in conflict with federal (e.g., cannot include geographic preference).
- With prior approval, agencies may piggyback on another contract
  - The piggyback must be approved by PTD prior to accessing

5

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## Vehicle Purchases: State Price Agreements

- ORCPP membership in the state ORPIN system is required to access state contracts.
- Once membership is renewed, agencies do not have to go into the ORPIN system to order vehicles. Work with vendors directly.

6

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## Vehicle Purchases: State Price Agreements

- Use PTD's Oregon Vehicle Description and Useful Life Standards and ORPIN Contract Crosswalk documents to determine available vehicles. (Available on PTD's web site)

7

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## Vehicle Purchases: What's Included?

- Vehicle purchases may also include:
  - Equipment to be installed on the vehicle, necessary to put it into service
  - Bus wraps and required identification

8

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## Vehicle Purchases: Review Forms and Samples

- Use the forms or develop agency forms to document the selection process:
- List vehicle specifications and provide to all vendors in that category: no. of seats; no. of ADA stations; high-floor or low-floor if relevant; vehicle category
- Include other required options (e.g., heavy-duty transmission required due to terrain)

9

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## Vehicle Purchases: Vendor Analysis and Selection Form

- Contact vendors and obtain written quotes
- Document vendor selection from price quotes:
  - List all specified equipment and evaluation criteria: vehicle models/vendors; special options; prices quoted; other criteria
  - Justify best value determination if lowest priced vehicle is not selected (e.g., heavy-duty transmission not available on lowest price vehicle)
  - Brand or geographic preferences are NOT acceptable criteria

10

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## Vehicle Purchases: Process for Ordering

- Send to PTD Capital Program Manager:
  - The Purchase Order form (agency assigns PO number)
  - Vendor's price quote for selected vehicle(s)
  - Selection rationale (forms we are reviewing today)
- PTD Capital Program Manager reviews, approves, signs, and submits the approved purchase order and price quote to the selected vendor, with a copy to your agency contact

11

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## Vehicle Purchases: Post-Grant Responsibilities

- Keep procurement records as long as vehicle is used in public transit service, plus 3 years:
  - Forms showing vehicle specifications (e.g., number of seats and ADA stations, optional equipment such as auto. tire chains)
  - Price quotes, options comparison and selection justification

12

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## Equipment Purchases

- Equipment as a Capital Project
  - Must be \$5,000 or more and useful life of at least one year to qualify as capital (may aggregate—e.g., a computer system purchase could include several PCs, printer, server)
  - Agencies must include capital equipment in inventory and report to PTD as long as it remains in transit service/use

13

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## Equipment Purchases

- Informal Quotes (if cost is under \$100,000)
  - Include written documentation on specifications for the purchase and vendor quotes
  - You must document, similar to vehicle awards, why you are selecting the vendor/product
- Ask questions if in doubt

14

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## Facility Projects

- A facility project may be phased in several stages
- Initial activities may begin with a planning grant that includes:
  - Project scoping, planning, public involvement,
  - Architecture and engineering (A&E), legal services
  - Environmental work

16

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## Facility Projects

- The next phase may include the capital activities:
  - Lot preparation, construction
  - Purchases for equipment, furniture, other amenities

16

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## Facility Projects

- If you are planning a facility or infrastructure project:
  - Review requirements before applying for a grant
  - Consider all activities required: review local planning and building permit requirements, get good cost estimates, and research before you begin

17

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## Facility Projects

- Start discussions early with stakeholders, partner agencies, planning staff, and engage the public
- Keep good records—some projects take years from the planning stage to construction

18

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## PTD Contact Information

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## General Program Support

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21

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## QUESTIONS AND ANSWERS

Thank you for your  
participation!

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