



Rail and Public Transit Division

VEHICLE PROCUREMENT

Instructions for Completing Vehicle Purchase Documents (Request For Quotes (RFQ) and RFQ Comparison forms)

A. General Guidelines

ODOT Rail and Public Transit Division (RPTD) has developed forms for transit agencies to use for documenting procurement activities in obtaining and comparing vehicle price quotes when purchasing vehicles with state or federal grant funds. These forms meet FTA and ODOT RPTD requirements. Use of these forms is not mandatory. Your agency may adapt the forms as needed for your particular procurement. If your agency vehicle procurement forms are used, verify they meet the FTA requirements of Third Party Contracting Guidance FTA Circular 4220.1F: <https://www.transit.dot.gov/regulations-and-guidance/fta-circulars/third-party-contracting-guidance>.

Information on determining vehicle selections must be documented and retained in your agency's procurement files as long as the vehicles are used for public transportation, plus three years.

NOTE: If your agency intends to purchase a vehicle through a process other than the Statewide Price Agreement (example by piggyback on an existing State of Washington or existing other Oregon agency contract), please contact the ODOT RPTD Capital Program Coordinator for **pre-approval**.

B. Request for Transit Vehicle Price Quote (RFQ) Form

Generally, all providers must use the State Price Agreement (SPA) for procuring transit. Transit providers must request price quotes from **at least three** vendors, but it is preferred that you request price quotes from **all** vendors on the SPA. If a vendor does not offer a vehicle in the desired vehicle category, it is not necessary to request quotes from that vendor.

The RFQ form is a two-way form, to provide both the tool for transit agencies to request price quotes for transit vehicles with required features from pre-qualified SPA vendors, and a tool for vendors to respond back to transit agencies in a comparable format. The sections of the RFQ form to be completed by transit agencies requesting quotes are in **black font** on the form. Those sections designed for vendors to respond back to requesting transit agencies with vehicle pricing and options information, are in **blue font** on the form.

Line-By-Line Instructions

1. For Transit Agencies Requesting Quotes

Page 1

- a) Check the "Initial Request for Quote" box at the top of page 1, and enter the due date when you would like the quotes returned to you.
- b) Check the "Grant Funded Purchase" box if using grant funds to purchase this vehicle.
- c) Enter the Vendor name, and the contact person information that you are sending the RFQ form to. At minimum, contact name and email are required; phone numbers are optional.

- You must send the RFQ to at least **three** vendors, it is preferred that you request price quotes from **all** vendors on the SPA. *If a vendor does not offer a vehicle in the desired vehicle category, it is not necessary to request quotes from that vendor.*

Use a separate RFQ form for each category of vehicle or different specifications within a category of vehicles. If purchasing multiple vehicles in the same category the specifications must be the same.

- d) Fill in the “Requesting Agency Information” box, with the appropriate contact person who will be reviewing the quotes for your agency.
- e) Circle or highlight the RFQ is from the Oregon State Price Agreement (should be in most cases), or from another source, such as an approved piggyback on a Washington State price agreement. To the right, enter the total number of vehicles you are purchasing (this must match your Grant Agreement Statement of Work.)
- f) Enter the basic vehicle information: check the appropriate vehicle category; note the *desired* length, number of regular seats, number of ADA stations, fuel type, high floor or low floor, and if desired, a brief special comment. This must also match your Grant Agreement Statement of Work.

Vehicles in Categories E-4 through E-7 are unmodified standard vehicles and are not included on the Oregon Public Transit SPA. To purchase a standard vehicle you may use other Oregon vehicle SPAs or obtain three price quotes from local dealerships.

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- g) Skip Part A on page 2 (vendor’s complete this); go directly to Part B.
- h) Complete the column for “Requesting Agency’s Required Specifications Description”. List each mandatory requirement for the vehicle you wish to purchase.

Any vehicle equipment or functions not available through a vendor in this section may eliminate their vehicle from consideration; only specify items that are truly required. Do not assume an item is or is not included in the base price; options vary by manufacturer and vendor, let vendors respond back to you whether an item is included in the base price or has an extra cost.

Part B table continued on page 3, if additional space is needed insert rows into the table. The column on the right, “Vendor Response” leave blank for vendors to complete.

CONSIDER: Required specifications are generally considered a pass/fail condition for the quotes you receive, so before listing all desirable features here, consider if some of these should be listed under “Vehicle Preferred Options” on page 3. Specifying too many details as “mandatory” may limit your vehicle choices unnecessarily.

IMPORTANT: Avoid using product brand names; use generic descriptions or functionality for vehicle options whenever possible. If it is necessary to name a brand of product for reference, you must specify “**or equivalent**” or “**or approved equal**” immediately following your description. FTA requirements call for competitive procurement and strictly prohibit brand name specifications.

POST-DELIVERY WARRANTY SERVICE: You may include proximity of post-delivery warranty maintenance and repair service as a required specification, particularly if your agency operates in a rural area of Oregon. State this in terms of time or distance (or both) for travel to/from your agency office or fleet yard. You may also include terms regarding pick-up of out-of-service vehicles in your required specifications, bearing in mind such requirements may increase your costs.

The simplest method of selecting a vehicle is to base selections on lowest cost meeting all required specifications. If using a **Best Value Determination**, please see discussion under the instructions for [Page 4](#).

Page 3

- i) Complete the column for “Requesting Agency’s Preferred Options Description”. List vehicle options which you want to include or consider if you have the funding, but these items are not required to put the vehicle in service. If additional space is needed insert rows into the table.

“Vendor Response” columns leave blank for the vendor to complete.

Again, the level of detail for preferred vehicle options is up to each agency to decide. Please review the “Consider” and “Important” statements in the instructions for [Page 2](#) above.

IMPORTANT: Lowest Cost selections are based on the lowest cost vehicle quote with all **required specifications**. If two or more vehicle quotes fall within a range of \$500 for Category E vehicles; \$1,000 for Category D vehicles; \$1,500 for Category C vehicles; \$2,500 for Category B vehicles; and \$3,500 for Category A vehicles, additional preferred option costs may be considered or you may select the vendor which offers your selected preferred options. *This limitation is one reason it is important to specify truly required features under Required Specifications.* Please consult the RPTD Capital Program Coordinator if you have questions.

Page 4

On this page, you can provide additional information for the responding vendors:

- j) In the Sample Floor plan section, you may attach or draw a sample floor plan. This is not required, but is useful to avoid confusion.
- k) The Vendor Information section provides general RFQ information for the responding vendors, and may be modified as needed to meet your agency’s requirements.
- l) Under Vehicle Selection Information, check one of the two boxes, indicating the evaluation criteria based on Lowest Cost with Required Specifications or Best Value Determination.

LOWEST COST AWARD: This is the easiest way to select a vehicle from the State Price Agreement and is the method RPTD expects most agencies to use. **Document** a purchase selection based on the lowest cost vehicle meeting all required specifications.

Please read the “IMPORTANT” statement in the instructions for [Page 3](#). If you have questions regarding the award, including using preferred options costs, please contact the RPTD Capital Program Coordinator.

BEST VALUE DETERMINATION AWARD: Best Value Determination require pre-approval from the RPTD Capital Program Coordinator. ODOT expects most agencies to use the Lowest Cost Award method of procurement. **You must provide a cost benefit analysis in order to have a best value determination approved.** Best Value Determinations also carry *additional FTA requirements* and involve extra work for your agency, so please consider carefully before requesting approval from RPTD to use this vehicle award method.

If your agency wishes to use a Best Value Determination to evaluate the award, you must list these evaluation factors on the RFQ form ([see bottom of page 4](#) of form.) You also need to assign and list a rating scale, such as a point range or percentage to these factors. You will also include that rating in your vehicle RFQ Comparison form see Section C.

Bulleted below are examples to consider when using the Best Value Determination. These are not justification for doing a best value determination; some of these factors can be described as preferred options in a lowest-cost award.

- Post-delivery vehicle warranty conditions and terms
- Vendor references from other agencies
- Drivability, perceived quality & workmanship based on Altoona test
- Maintenance staff training
- Costs that would have to be incurred by the agency to include additional vehicle brands/types into its fleet when it performs its own maintenance
- Distance limitations in a rural community to perform maintenance (50 miles or more to a shop that is qualified for service and maintenance of the lowest price vehicle).
- Agencies with in-house vehicle maintenance shops, existing fleet uniformity and cost for additional purchases or retooling of the shop in order to perform maintenance on the lowest priced vehicle.
 - If an agency must purchase shop equipment or re-tool existing equipment for a different vehicle manufacturer, a comparative cost-benefit analysis of these additional costs must be included in the life cycle cost of the new vehicle.

Example: Best Value Determination using either points or percentage:

1. *Vehicle includes all Required Specifications (Pass/Fail)*
 2. *Best Value Determination is approved by ODOT RPTD (Pass/Fail)*
 3. *Lowest pricing with Required Specifications (45 points)*
 3. *Vehicle provides all Preferred Options (15 points)*
 4. *Post-delivery warranty/repair service preferred within 10 miles of agency's facility (20 points)*
 5. *Vehicle drivability based on Altoona test (10 points)*
 6. *Reference checks for vendor-provided references (10 Points)*
- Total Possible = 100 Points*

C. Vehicle Purchase RFQ Comparison Form

There are two *Vehicle Purchase State Price Agreement RFQ Comparison Forms* available for agency use. One is for a *Lowest Cost Award* selection and the second is for a *Best Value Determination Award*. Both of these blank forms are included as separate worksheet tabs in the Vehicle Purchase RFQ Comparison Excel workbook. These forms were designed to be used in conjunction with the RFQ form described in [Part B](#). Agencies may use the forms when completing their own vehicle price comparisons, to document final vehicle selection.

The purpose of the documents is to assist transit agencies in meeting minimum procurement documentation required for federally funded vehicle purchases. You may modify these forms for use by your agency, in accordance with your needs.

Unlike the RFQ form which is designed to be sent to vendors for a response back to you, these forms for comparing and analyzing RFQ responses received from vendors are intended solely for internal use by your agency and RPTD staff; these are not designed to be sent to vendors.

D. Lowest Cost Selection – Statewide Price Agreement RFQ Comparison Form

The first worksheet tab *Lowest Cost RFQ Comparison Form*, provides a worksheet for documenting vehicle selections from RFQ's, for a simple "lowest cost with required options" selection. This is a simple

one-page form which documents a selection based on the lowest-cost quoted vehicle, which meets all required specifications you documented on the RFQ form.

Under this award method, you can also use the preferred vehicle options as a tie-breaker when two or more vehicle quotes, meeting all required specifications, are close in cost range. (See instructions for the RFQ Form [Page 3, section i](#))

Line-By-Line Instructions

- a) Agency identification information – in the first section at the top, enter your agency name, contact person and phone, the **ODOT Grant Agreement number** funding your vehicle purchase, and date you are completing this form.
- b) Basic Vehicle identification – in the second section, enter your vehicle useful life category; the number of vehicles in this category you are purchasing; and seating information.
- c) Required Specifications and Additional Preferred Options –attach copies of the each RFQ form returned to you by the SPA vendors or attach your specification form listing the required and preferred options. The attachment must be the specifications sent to vendors for a quote response back to you.

You do not need to attach copies of RFQ's sent to non-responsive vendors; note this on the form, for that particular vendor "did not respond." The three-quote requirement is met with attempted quotes; you cannot control a vendor not responding.

- d) The third section of the form, under the yellow header: "Prices Quoted from Vendors", is where you enter a brief summary of the quotes you received. In the column headers provided, note the vendors you sent a request for quote. Underneath each vendor, please note the following in the rows provided:
 1. Make and model of vehicle proposed by vendor (for example: "Startrans Ford F350").
 2. Vehicle base price (should match the base price for that make/model/length noted in the ORPIN Contract Crosswalk table for the Statewide Price Agreement).
 3. The combined cost of all the required equipment and specifications.
 4. Total vehicle cost including base price plus all required equipment and specifications ("2" + "3" above), this amount should automatically total for you in the form. If you have modified the form, please over-ride the formula and enter the correct total.
 5. The combined cost of the preferred options, which you desire (see the instructions and limitations for this, above).
 6. The total vehicle cost including all required equipment and specifications, and identified preferred options, this amount should automatically calculate for you.
- e) Below the cost totals, indicate your selections under each vendor, checking "Selected" for the lowest cost vendor quote, and checking "Not Selected" for the others. In the "Comments" box, you may enter a simple statement about your selection, such as "Vendor X offered the lowest cost vehicle with our required specifications, and we selected four additional preferred options."
- f) In the Agency Signature box, the person in your agency authorized to approve purchases and major grant activities should identify, sign and date the form, this may be different from the contact person actually completing the form.

This documentation should be submitted with your RFQ. Please contact the Capital Program Coordinator at ODOT RPTD if you have any questions about this process.

E. Best Value Determination Selection – State Price Agreement RFQ Comparison Form

The second worksheet tab *Best Value RFQ Comparison Form*, provides a single form to document request for price quotes and the final vehicle award using a best value determination. Agencies seeking to use this method are required to seek pre-approval from the RPTD Capital Program Coordinator and **must provide written justification and a cost benefit analysis** for using a best value determination.

The purpose of this form is to document your best value award for your and RPTD's procurement records. It should be apparent that the best value product was selected; that the evaluation criteria was provided to all vendors; and that all vendors had been provided an equal opportunity to compete.

Prior to preparing the initial RFQ form, agencies doing best value determination awards should carefully consider the factors, in addition to cost, which are important for your agency in a vehicle selection. Please see the discussion about best value factors on [page 4](#) of this document for some examples of non-equipment factors most commonly identified by transit agencies.

Agencies must document how all factors are considered in evaluating price quotes. A point scale or percentage weighting scale are the most common methods. However, some agencies may also utilize the Altoona test report or other means of identifying best value.

When using the best value award the "Best Value Determination" box on page 4 of the RFQ form must be checked and evaluation factors are required to be provided. Include what the evaluation criteria is, how the cost analysis will be documented, and how options will be rated, scored or weighted in the final selection decision. It is not necessary to provide vendors with the actual rating or ranking scores for each vendor or copies of the RFQ Comparison form, these are for your agency's and RPTD staff's use.

When in-house agency shop maintenance equipment re-tooling costs, or other non-purchase-price costs are a factor in best value determination awards, a cost-benefit analysis must be documented and included with the documentation submitted to RPTD. The FTA does not specify a format for the analysis, only that the analysis be documented, it must be as objective as possible and the rationale for selection must be reasonable.

Line-By-Line Instructions

Page 1

- a) Agency identification information – in the first section at the top, enter your agency name, contact person and phone, the **ODOT Grant Agreement number** which is funding your vehicle purchase, and date you are completing this form.
- b) Basic Vehicle identification – in the second section, enter your vehicle useful life category; the number of vehicles in this category you are purchasing; and seating information.
- c) Required Specifications and Additional Preferred Options –attach copies of the each RFQ form returned to you by the SPA vendors or attach your specification form listing the required and preferred options. The attachment must be the specifications sent to vendors for a quote response back to you.

You do not need to attach copies of RFQ's sent to non-responsive vendors; note this on the form, for that particular vendor "did not respond."

For best value factors, you should also note or attach a summary of methods other than the RFQ, which may have been used to capture best value information; for example, vendor customer reference checks, utilize the Altoona test report, or other means of identifying best value. You may check both the "From RFQ" and "Other" boxes if this is applicable.

- d) The third section of the form, under the yellow header: "Prices Quoted From Vendors", is where you enter a brief summary of the quotes you received. In the column headers provided, note the vendors who you sent RFQ forms to. Just underneath each vendor, please note the following in the rows provided:
1. Brief description of vehicle proposed by vendor (for example: "Startrans Ford F350").
 2. Vehicle base price (should match the base price for that make/model/length noted in the ORPIN Contract Crosswalk table for the Statewide Price Agreement).
 3. The combined cost of all the required equipment and specifications.
 4. Total vehicle cost including base price plus all required equipment and specifications ("2" + "3" above), this amount should automatically total for you in the form. If you have modified the form, please over-ride the formula and enter the correct total.
 5. The combined cost of the preferred options, which you desire (see the instructions and limitations for this, above).
 6. The total vehicle cost including both required equipment and specifications, and identified preferred options, this amount should automatically calculate for you.

Page 2

- e) At the top, please re-enter agency name and grant agreement number.
- f) In the Best Value Factors box, list each factor in the column on the left side, insert more lines if necessary. In the "Vendor" columns, note the rating score; ranking; percentage; or other criteria used to evaluate the best value factors. List each evaluation committee members score for each responding vendor. Enter the total or combined overall vendor score or ranking in the line provided at the bottom.
- g) Below the best value factor totals, indicate your selections under each vendor, checking "Selected" for the vendor with the best value award and checking "Not Selected" for the others. In the "**Explanation/Rationale**" box, you must enter a statement summarizing your best value award. This is the single most important section of the form, so attach a separate document if needed to fully explain your selection rationale.
- h) In the Agency Signature box, the person in your agency authorized to approve purchases and major grant activities should identify, sign and date the form, this may be different from the contact person actually completing the form.

This documentation should be submitted with your RFQ. Please contact the Capital Program Coordinator at ODOT RPTD if you have any questions about this process.