



Public Transit Division

VEHICLE PROCUREMENT Instructions for Completing Vehicle Purchase Comparison and Analysis Forms

ODOT Public Transit Division (PTD) 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. While the forms themselves are not mandatory, the 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 provision, plus three years.

The forms and instructions provide one method to capture the required information. You may adapt the forms with the understanding that if something is missing or not understood, you may be required to amend and resubmit the documents. These documents may be adapted for use in procuring other equipment or capital assets.

Transit providers should request price quotes from all vendors on the price agreement contracts that offer a vehicle in the awarded vehicle category.

The *Vehicle Purchase Comparison and Analysis Forms* (Forms) documents were developed in Excel worksheets available on the PTD web site on the Programs/Capital page: http://www.oregon.gov/ODOT/PT/PROGRAMS/capital_program.shtml listed under the Buying and Maintaining Vehicles banner. Completed sample forms are also available for review at the same link.

The Forms document includes two tabs which are the blank forms set up for use by transit agencies. The first, titled *Vehicle Purchase Price Comparison Form*, provides an example for documenting vehicle specifications and information provided to vendors for requesting price quotes. The second, *Vehicle Purchase Analysis and Selection Form*, provides one way of documenting the scores and analysis of the price quotes from vendors and to document the product selection. The purpose of the document is to assist transit agencies in meeting minimum procurement documentation required for federally funded vehicle purchases.

Please note that the two worksheets are set up so that if you use the *Comparison* form, some of the information is automated on the second tab, or the *Analysis* form. Be aware that you might have to do some adjusting if you modify the forms or merge them into one worksheet.

The Excel Forms document was created with a few formulas to calculate totals. As with any Excel document, you may insert or delete row and columns as needed for more requirements or options. Be sure to double check formulas when adding or deleting

rows. Hiding rows retains the formulas—if you hide rows, be sure to delete any entries that would add up in the formula cell. Remember to save the file to your local computer so that you don't lose your changes. Use the completed examples for additional clarification and illustration of how to complete the forms.

The examples demonstrate how the forms might be used for a couple of scenarios. ODOT PTD staff developed two: Example A shows a straightforward vehicle purchase with lowest price selection, and Example B is a more complex vehicle purchase showing both mandatory specifications and preferred options. The complex example uses a scoring system to determine a best-value selection rather than lowest price.

We also have two samples provided by transit agencies that ordered vehicles and used the original forms (which have since been revised to make them easier to use). We made up transit agency and vendor names in order to use the samples as training tools to point out what could be improved, or where required information was not provided.

INSTRUCTIONS FOR PRICE COMPARISON FORM

Basic Vehicle Information: In the boxes at the top of the form, fill in the vehicle category (see Oregon Vehicle Description and Useful Life Standards or the ODOT ORPIN Contract Crosswalk document for categories), engine and fuel type, and number of required ambulatory seats and ADA stations (securement/tie-down areas). Remember that the vehicle you are obtaining quotes for must match the vehicle awarded in the grant agreement statement of work.

Required Specifications: In this section, enter any additional required vehicle specifications and vehicle options. Required specifications are the “must-have” components and functional features on the vehicle. Vendors must be notified that these are mandatory specifications and that a price quote will be rejected if the vehicle does not include these features. Required specifications may include specific functional equipment such as size of engine, fuel type, total number of ADA stations, upgrades on air conditioning/heating units, and other mandatory vehicle components. This page of the document, or a list of required and preferred options, and the evaluation criteria/scoring system, should be sent to all the vendors awarded contracts in the vehicle category that you are requesting price quotes for.

Preferred Options: Preferred options are functional features or components that are desired but not mandatory for a quote to be accepted. Preferred options should still be considered and scored in selecting the vehicle. This is where the analysis would justify selecting a vendor's product that doesn't meet all of the preferred options. Information provided to vendors must state how these options will be in the scoring, such as, “in addition to meeting required specifications, price will be weighted at 70% and preferred options will be weighted at 30%.” Examples of preferred options might include automatic tire chains, transmission upgrade to heavy-duty (if not standard for the size/type of vehicle), or other components or upgrades to the vehicle.

Scoring and Evaluation Criteria: Describe the scoring and evaluation criteria where indicated. If the selection will be made strictly on vehicles meeting all required specifications at the lowest price, it should be stated here. If you have a more complex set of required specifications and preferred options, and/or your selection is based on best value, a scoring system can be used. Whatever system is used, notify the bidding vendors on how selection decisions will be made, and include it in the form.

Scoring criteria for complex analysis should be assigned points or percentages by the categories of options. For example: required specifications = 15 points; price = 5 points; preferred options = 5 points, for a total of 25 points. Another example: required specifications = pass/fail; in addition, price = 50%; preferred options = 50%. See Example B for one way to document a scoring system.

Be sure to use generic functional descriptions when specifying components. Avoid using product names such as “Braun” lift, or “Mountaineer XLG” low-gear transmission. If a brand name must be used, be sure to add the words “or equivalent” after the brand name. Use of federal funds for procurements prohibits vendor or name-brand preference in selecting a vendor or product.

Best value may influence product selection when an agency that does in-house vehicle maintenance has invested in shop equipment that would have to be re-tooled or new equipment purchased at additional cost in order to purchase a different make of vehicle. Supporting documents should be prepared to justify the cost analysis used.

Prices Quoted From Vendors: Use this section to document the price quotes for standard comparison. Use the column headers for “Vendor [insert name]”, etc. and type in the vendor names. Enter all of the basic information and required specifications, as well as preferred options vendors were asked to bid on with the prices quoted from each vendor. Costs entered are set up to be subtotaled by a formula in the worksheet.

The *Other (Not Vehicle Components)* section might include access to a local dealer or shop for warranty work or maintenance, delivery charges, or extended vehicle or component warranties (must not exceed the useful life of the vehicle).

The total price by vendor is also computed by formula. Check to be sure the totals match the vendor quotes provided.

INSTRUCTIONS FOR ANALYSIS AND SELECTION FORM

This form is used to document the prices quoted by each vendor and your agency’s scores and rating for each product quoted. There is an area to describe the rationale to support your selection for a simple lowest-price selection, or to document if some of the required specifications are not met so that a vendor’s product and price quote is rejected from further consideration. If the selection is based on lowest price, the analysis may be quite simple and straightforward. If there are additional scored criteria, such as preferred options and other performance requirements, the analysis would require more explanation.

The purpose of this form is to document and justify your selection for your procurement records. The information can be used to respond to a protest of the result, or to document compliance with procurement procedures when your agency is reviewed. Any reasonable person should be able to read the documents and agree 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 bid.

Vendors' Price Quotes: This section displays the base price and grand totals from the Price Comparison Form worksheet. You will need to insert the vendor's names, or copy them from the Price Comparison Form.

Assign Scores for Each Vendor: This section is for entering your agency's scores, by the criteria categories you have set up, for each vendor's product. These entries should reflect the Price Comparison worksheet sections that vendors were asked to quote prices on.

Vehicle Selected and Rationale: Use this area to summarize how each vehicle met or did not meet the requirements. See examples for how this might be done. Be sure to indicate which Vendor's product was selected.

Price Quote Analysis: This section is optional and should be used to provide a narrative explanation for complicated best value selections. Summarize the reasons for each product's score and which vendors' products were considered acceptable products, or not, compare prices, and describe why any products quoted were eliminated from consideration due to high cost, or a best value analysis.

Example B shows how you might document the analysis and product selection. The selected vendor should be either the lowest cost product that meets all required specifications, or the product with the best overall value when evaluating preferred options, vehicle servicing or other performance options. The guiding principles of your analysis should be fairness, impartial and objective evaluation, and reasonableness.

The form must be signed and dated by the agency representative at the bottom of the form and include contact information.

This documentation should be submitted with your Purchase Order form when your agency is ready to order the vehicle(s).

Please contact the Capital Program Manager at ODOT PTD if you have any questions about this process.