

Transportation Committee

Meeting date: August 9, 2010

Council meeting August 25, 2010

ADVISORY INFORMATION

Date:	August 2, 2010
Subject:	Adopt Regional Policies and Procedures for Vehicle Fleet, Procurement and Facilities Ownership
District(s), Member(s):	All
Policy/Legal Reference:	Policy 1-3 Transportation Planning & Transit Services
Staff Prepared/Presented:	Arlene McCarthy, MTS Director (651-602-1217) Gerri Sutton, Assistant Director, Contracted Transit Services, MTS (651-602-1672) Chris Gran, Director of Procurement, Metro Transit (612-349-5060)
Division/Department:	Metropolitan Transportation Services (MTS)

Proposed Action

That the Metropolitan Council adopt the attached regional policies and procedures:

- Vehicle Fleet Policy
- Procedures for Procurements
- Facilities Ownership Policy

Background

In the past several years, numerous changes and issues have arisen prompting the need for written policies and procedures between the Metropolitan Council and the Suburban Transit Providers (STPs), including:

- Finding a balance between the STPs' desire for autonomy and the Council's responsibilities as the recipient of federal and state funds and ensuring equity, efficiency and transparency in the regional transit system.
- The Council, as the direct recipient of federal funds, has oversight responsibility for all federal funds, including those passed through to STPs and other organizations through subrecipient agreements. In the 2009 Triennial Review, the FTA found that the "Met Council does not conduct adequate oversight of its subrecipients and contractors.....Met Council conducts some oversight of grant management and federally funded procurements by these contractors and communities, but does not have a comprehensive oversight plan to monitor all of the activities of the subrecipients to ensure compliance with applicable federal requirements.....There is also insufficient oversight of vehicle maintenance activities."

In response, the Council agreed to develop and submit to the FTA an oversight and monitoring plan for subrecipients. The subsequent plan included Council-provided training on all federal regulations to all subrecipients and increased monitoring.

- The new motor vehicle sales tax (MVST) funds available for regional transit as a result of the 2006 constitutional amendment. This funding is above the base MVST distributed to individual providers per state statute. To date, the new funds, known as Regionally Allocated MVST, have been used to preserve existing services and fund committed expansions such as Northstar commuter rail and Urban Partnership Agreement express services. However, it is anticipated these

funds will be used in the future for expanding base bus services in the region. The 2030 Transportation Policy Plan adopted by the Council in January 2009 calls for the Council, with participation from the STPs, to develop a Regional Service Improvement Plan to guide expansion investments.

- Need for clarification and consistency on regional transit fleet capital cost and maintenance responsibilities. The Council owns the buses and leases them to providers through a Master Lease Agreement with the Council, STPs and private contractors each having certain fleet responsibilities. Fleet responsibilities, however, have been interpreted differently among providers leading to inconsistencies and confusion. The resulting issues made it difficult to plan capital expenditures in a fair and equitable manner.
- The Council is the recipient of state G.O. bonds with oversight and ownership responsibilities for those funds, including when they are passed through to other public entities. Issues of eligible uses and capital improvement ownership are becoming more frequent as the bonds are used on a larger number of projects and when more partners are involved.

These and other situations require coordination as well as a clear understanding of roles and responsibilities by the Council, the STPs and other providers to 1) ensure equity and transparency, 2) avoid misunderstandings, inefficiencies and delays, and 3) ensure compliance with federal and state funding rules and requirements.

In late 2008, Council Chair Bell initiated a joint Council/STP Policy Committee to advise the Council on regional policies. The three policies and procedures recommended for adoption have been discussed at length by Council and STP staff and at two Policy Committee meetings. All were revised in response to input from STP staff and policy members.

Work on a Regional Transit Operating Revenue Allocation Policy (including operating reserve targets) and a Regional Service Improvement Plan Process is underway. These will be presented to the Council for adoption in the near future.

Rationale

The *Vehicle Fleet Policy* addresses the following topics: vehicle selection and purchase; maintenance, repairs and inspections; vehicle transfer, replacement and disposal; Council funding of revenue and non-revenue vehicles; vehicle numbering and graphics, fleet management including spare ratio, scheduled standbys, state fair fleet, expansion buses and Metro Mobility fleet; vehicle equipment including fare collection equipment, standard bus configurations and ancillary equipment.

The *Procedures for Procurements* address procurements using federal funds that are passed through to subrecipients. These procedures provide for intergovernmental procurements agreements, joint procurements, "piggyback" procurements and sole source procurements. They also outline Council review responsibilities and procedures on STP-led procurements.

The *Facilities Ownership Policy* provides for ownership of facilities by the STPs. The policy also outlines the routine operating and maintenance schedule which is funded by the owner's operating budget as well as long-term capital maintenance requirements which must be identified and programmed in the capital budgeting process.

All three policies and procedures detail the roles and responsibilities for the various parties with the goal of improving federal compliance, simplifying federal and state compliance monitoring, streamlining work for all stakeholders, and creating efficiencies, equity and transparency in the regional transit system.

All policies defer to federal and state requirements. It is noted on all three policies that they may be periodically reviewed and revised.

Funding

These policies and procedures outline funding responsibilities for the Council as well as the STPs, but do not impose a change to the Council's 2010 operating and capital budgets. The proposed 2011 capital budget reflects the Council's funding responsibilities for the regional vehicle fleet.

Known Support / Opposition

Individual STPs have expressed varied concerns with various details within the three policies and procedures.

The issue that received the most discussion was the proposed 14-year life of coach buses. The Vehicle Fleet Policy includes a compromise position: The Coach buses will be programmed in the CIP for a 14-year replacement cycle (except for the six SouthWest Transit (SWT) 2000-year MCI coach buses). In the first half of 2011, the Council will conduct an APTA-led national peer review to inspect the six SWT 2000-year MCI coach buses in their 11th year and make a recommendation on the programmed 14-year coach bus life. If the outcome of the APTA peer review results in a programmed life of less than 14 years, the CIP will be revised to reflect the recommended program life. The six SWT year-2000 buses will be transferred to the Metropolitan Council to operate in their 13th and 14th years.

If the peer review results in a coach bus programmed life less than 14 years, the change will be reflected in the Council's 2012-2016 CIP.



VEHICLE FLEET POLICY

MAY 2010



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This policy may be periodically reviewed and revised.

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**SELECTION AND
PURCHASE
Policy 1:
Selection of
Vehicle Type
Guidelines**

Vehicle type should be determined and purchased according to service type and passenger loads. Interlined and start-up services may provide exceptions.

Vehicle type	Passenger Loads*	Service Type	Approx. GVW	Minimum Vehicle Life
Commuter Coach	Min: 30 Max: 57	Express with a one-way trip length of greater than 15 miles AND duration greater than 30 minutes		12 - 14 years**
Articulated Diesel Transit Bus	Min: 30 Max:58 (Express) Max:73 (Urban Local)	Express, Local		12 years
Articulated Hybrid Transit Bus	Min: 44 Max:73	Local		12 years
40' Hybrid Transit Bus	Min: 29 Max: 48	Local		12 years
40' Diesel Transit Bus	Min: 20 Max: 38 (express) Max:48 (local)	Express, local		12 years
30' Transit Bus	Min: 13 Max: 26	Medium volume local; low volume express	> 26,000	12 years
Medium-Duty Transit Bus	Min: 13 Max: 26	Suburban circulator services with limited service window (e.g., peak only)	16,000-26,000	7 years
Heavier-Duty Small Bus	Min: 12 Max: 24	Limited stop or express with 4-6 weekday trips or dial-a-ride services	> 14,500	5 years
Light-Duty Small Bus	Min: 2-4 pass./hr. Max: 6	Limited stop or express with 4-6 weekday trips or dial-a-ride services	< 14,500	5 years and: 200,000 (diesel) 175,000 (gas)

*Peak loading pattern

****Coach buses will be programmed in the Capital Improvement Program (CIP) for a 14-year replacement cycle (except for the six SouthWest Transit (SWT) 2000-year MCI coach buses). In the first half of 2011, the Council will conduct an APTA-led national peer review to inspect the six SWT 2000-year MCI coach buses in their 11th year and make a recommendation on the programmed 14-year coach bus life. If the outcome of the APTA peer review results in a programmed life of less than 14 years, the CIP will be revised to reflect the recommended program life. The six SWT year-2000 coach buses will be transferred to the Metropolitan Council to operate in their 13th and 14th years.**

**Policy 2:
Guiding
Principles of New
Vehicle
Purchases**

All federally funded vehicles purchased under agreements not directly executed by the Council shall be purchased in accordance with the Council’s Procedures for Suburban Provider procurements.

Vehicles shall be purchased in accordance with these guiding principles:

- 1) Upon request by a suburban provider, the Council will include the provider in the development of bus specifications and coordinate the procurement to maximize quantity and leverage optimal pricing.
- 2) The regional fleet will be standardized to the greatest extent feasible in accordance with the Standard Vehicle Configurations (Exhibits A through F). This standardization does not preclude the procurement of innovative vehicles for a specific or demonstration purpose.
- 3) The Council will consider life-cycle costing.
- 4) The Council will consider commercial availability.
- 5) Hybrid Buses and Alternative Fuel Buses are appropriate in any vehicle type if:
 - a) a complete life-cycle cost-benefit analysis suggests that they would represent a more effective use of capital or operating dollars, or;
 - b) when broader public policy issues suggest a significantly higher than usual value of factors such as emissions, noise profiles and support of advanced technologies compared to traditional diesel buses.

Rationale:

The Council will create efficiencies, to the greatest extent possible and practical, by standardizing vehicle options upon purchase.

**Policy 3:
Vehicle
Ownership**

Vehicles funded in whole or in part by the Council shall be owned by the Council. Fleet vehicle titles or Certificates of Origin shall be delivered to the Council within 15 days of vehicle acceptance.

Rationale:

It is important to establish a regional fleet comprehensive plan and effectively manage resources in a

	<p>dynamic and unpredictable environment. Council ownership satisfies the Federal Transit Administration's requirement for <i>Satisfactory Continuing Control</i>.</p>
<p>MAINTENANCE, REPAIRS, INSPECTIONS</p> <p>Policy 4: Mid-life Rehab Costs</p>	<p>Publicly funded vehicles with a useful life of 12 years or more per Council policy will be eligible for planned mid-life rehabs to include seat upholstery replacements, repair of uneven flooring, other interior hardware such as grab rails, privacy shields and seat frames, exterior paint, body work, lift overhauls, articulated joints and bus frames. In the event of a capital funding shortfall, funding major component failures will be a higher priority than funding mid-life rehabs.</p>

**Policy 5:
Major
Component
Failures**

For vehicles in which the Council holds the title or the Certificate of Origin, the Council will cover the cost of major component work, through the capital budget, that meet the following criteria:

- 1) Are not included in the manufacturer specified preventive maintenance items, and;
- 2) Have a cost of \$5,000 or more (including the cost of labor) per unit.

Major component work will be completed on an as-needed basis. "As needed" means that engines and transmissions and other items not included in the manufacturer's preventive maintenance schedule will be replaced or rehabbed on a preemptive basis based on technical criteria that indicates component failure is imminent. The Council's fleet manager will consider verifiable and substantive technical information for individual vehicles and, based on such information, may authorize replacement of major components prior to failure. Technical information to be considered in the decision making process includes but is not limited to:

1. Age of the vehicle.
2. Vehicles of the same make, model and year.
3. Expected remaining life on the engine or transmission.
4. History of that particular vehicle engine or transmission.
5. Type of engine or transmission and the typical lifespan of that particular model.
6. Type of service the vehicle is used for.
7. Results of oil analysis.
8. Results of compression test.
9. Oil consumption trend line.
10. Antifreeze in the oil.
11. Fuel consumption trend line.

Rationale:

An April 2007 study conducted by the FTA entitled *Useful Life of Transit Buses and Vans* states that only very large cities with "severe" service conduct planned mid-life overhauls. The majority of transit agencies across the U.S. invest in major repairs on an as-needed basis. Replacing items on an as-needed basis assures that funding is utilized as efficiently as possible.

<p>Policy 6: Preventative Maintenance Schedule</p>	<p>The Council and Lessees of Council-owned vehicles agree to comply with the manufacturer’s preventive maintenance plan (or better) and will provide a written statement to the Council attesting to this agreement. Any deviation that reduces the level of maintenance from that prescribed by the manufacturer must be approved in advance and in writing by the Council.</p> <p>Rationale: The Council is obligated, as owner of the regional fleet vehicles, to ensure that these assets are being maintained and utilized in a manner that will maximize the vehicle life in an effective manner.</p>
<p>Policy 7: Quality Assurance Inspections</p>	<p>The Council will conduct quality assurance inspections to ensure compliance with prescribed preventative maintenance schedules.</p> <ol style="list-style-type: none"> 1. The Council will conduct, at its sole discretion, vehicle inspections to include fluid samples. 2. All inspections will be documented and retained on file at the Council. 3. Test results will be shared with the provider. 4. Failure to comply with the manufacturer-specified preventive maintenance schedule will result in the Council’s right to deny payment of costs related to engine, transmission or lift failures. <p>Rationale: The Council is obligated to ensure that all assets are being maintained and utilized in a manner most advantageous to the residents of the metropolitan area.</p>
<p>VEHICLE TRANSFER, REPLACEMENT AND DISPOSAL</p> <p>Policy 8: Vehicle Transfer to Another Provider</p>	<p>The Council reserves the right to redeploy regional fleet vehicles to another provider within the region.</p> <p>When the transferor is subject to DOT vehicle inspections, vehicles transferred from that provider to another provider must pass a Department of Transportation (DOT) inspection prior to the transfer of such vehicle. The transferor shall arrange for the inspection and pay any relevant costs. Any deficiency identified by the DOT must be fully remedied at the expense of the transferor. The receiving provider reserves the right to conduct an inspection prior to transfer and any significant defects identified during that inspection shall be repaired by the transferor.</p> <p>When the vehicle is transferring from a provider that is exempt from DOT inspections, the receiving provider shall inspect the buses before transfer takes place, and any significant defects identified</p>

during that inspection shall be repaired by the transferor. The receiving provider must be given the opportunity to inspect the vehicle over a lift or maintenance pit provided by the transferring provider upon request.

The transferring provider must provide the receiving provider with a copy of maintenance records of the bus being transferred.

Rationale:

Used buses must often be transferred to successor contractors at the beginning of a new contract term. Successor providers are entitled to receive vehicles that have been properly maintained and are in good working condition. All providers must be held accountable for the proper maintenance of vehicles up to the date of transfer.

**Policy 9:
Vehicle Disposal**

Vehicles that have met or exceeded their useful life, per the rules and guidelines established by the Federal Transit Administration, the State Department of Administration and Council policy shall be eligible for disposal. Vehicles where the cost of repairs as determined by the Council Fleet Manager exceeds the remaining net book value will be considered eligible for disposal.

1. For unplanned removals, suburban and private providers must receive prior written or electronic approval by the Council's Manager of Fleet Services or designee in the Metropolitan Transportation Services Department before removing the vehicle from revenue service. Prior written or electronic approval or denial must be received within 14 calendar days of the request or it can be accepted as tacit approval.
2. Buses shall be sold either from the provider's site or shall be delivered to a site designated by the Council.
3. All ancillary equipment will be removed by the provider to include, but not limited to, fare collection equipment, AVL/APC equipment and bike racks unless otherwise approved in writing by the Council.
4. The provider shall deliver the vehicle to the designated site under its own power unless authorized in advance by the Council.
5. All vehicle graphics that are established by the Council (for example, regional striping and Council logos) shall be removed or covered with matching paint at the expense of the provider.
6. All vehicle graphics that were added by the provider shall be removed from the vehicle at the expense of the provider unless authorized in advance by the Council.
7. Any proceeds obtained through the disposal of a vehicle shall be transferred to the Council.
8. Proceeds obtained by the Council for the disposal of assets shall be deposited back to the capital fund.

Rationale:
All publicly funded assets shall be disposed of in a fashion that allows any interested party to have equal access to the retired asset. Logos, striping and other agency identifiers must be removed upon removal from service for security-related reasons and to protect the public image of all regional transit providers.

COUNCIL FUNDING
Policy 10: Non-revenue Vehicles

The Council will fund a reasonable number of non-revenue vehicles for use by Metro Transit, Metropolitan Transportation Services and the suburban providers.

Policy 11: Maximum Council Funding per Vehicle Type

The Council will provide a maximum amount of funding per vehicle based on the price of the vehicle with "standardized" options (see Policy 17) plus 5% to allow for modest upgrades to be determined by each provider. Any vehicle procurement shall include a pricing proposal for the standard vehicle in addition to a vehicle priced with the desired options.

For regional fleet vehicles, the average cost of all ancillary items, excluding fare collection capital, will be included in the maximum Council funding. All costs in excess of the maximum Council funding will be the responsibility of the provider.

Rationale:
The Council should provide for a consistent and equitable allocation of available funds and equipment/vehicles to all passengers regardless of provider. Decisions made at the local level that inflate capital costs should not impact all other regional providers.

See also:
Policy 18 on funding-eligible vehicle equipment and ancillary items.

VEHICLE IDENTITY
Policy 12: Assignment of Bus Numbers

Bus numbers should be assigned to new vehicles based on the following schema:

Provider Name	Assigned Range of Numbers
Metro Transit	0-3999, 7100-9999
Minnesota Valley Transit Authority	4000-4999
South West Transit	5000-5999
Metro Mobility	6100-6599 OR 61000-63999 OR 64100-64199 OR 68000-68999

**Policy 13:
Vehicle Graphics**

Scott County	64000-64099
Other Regional Providers:	Big Buses 6000-6099 OR 60000-60999
•Plymouth Metro Link	Small Buses 6600-6699 OR 64200-66999
•Maple Grove	
•Shakopee	
•Prior Lake	
•MTS contracts	

All vehicles funded by the Council shall be outfitted with the following graphics:

1. Small buses operated by dial-a-ride providers, shall display exterior graphics in compliance with the Council's adopted plan. The dial-a-ride public operator may include graphics that identify the local service in a manner that does not cover or interfere with the Council's graphics package.
2. Small buses that are operated by a private contractor under direct contract with the Council in a dial-a-ride mode shall display exterior graphics in compliance with the Council's adopted plan. The operator may include up to two private company logos incorporated with their DOT operator number that are no larger than 12" x 12" each and shall be placed in an area that does not interfere with the Council's graphics package. A county or counties that administer Transit Link dial-a-ride service may include graphics that identify the local service (for example, "Edina Dial-a-Ride") in a manner that does not cover or interfere with the Council's graphics package.
3. Large buses, operated by a private contractor under direct contract with the Council, shall display outward graphics in compliance with the Council's adopted plan. The operator may include up to two company logos that are no larger than 16" x 16" each and shall be placed in an area that does not interfere with the Council's graphics package.
4. U.S. DOT numbers must be displayed per U.S. DOT requirements.
5. Buses operated directly by the Council shall comply with the Council-approved graphics package.
6. Buses operated by suburban providers are not subject to this policy, with the exception of regional transitways.

Rationale:

All vehicles that are linked to the regional transit system and that are funded by the Council should be readily identifiable as such by the general public. The Council's objective is to create a seamless service and consistent image to its riders.

See also:

Policy 9, disposal terms numbers 6 and 7.

FLEET MANAGEMENT

**Policy 14a:
Spare Vehicle Ratio**

Regular-route and general public dial-a-ride transit service contracts should utilize the following service to spare ratio:

Number of Vehicles Needed to Deliver Service, by Vehicle Type*	Appropriate Number of Spare Vehicles
1-4	1
5-9	2
10-15	3
16-20	4
21-25	5
26-30	6
31-35	7
36-40	8
46-49	9

Active revenue fleets of 50 buses or more cannot exceed a 20% spare factor, per FTA.
*See Policy 1: Selection of Vehicle Type.

**Policy 14b:
Scheduled Standby Vehicles**

As a general guideline, a maximum of one scheduled standby vehicle should be provided for every 50 peak buses.

Rationale: Strategically deployed scheduled standby vehicles maintain service quality and reliability, and are included in peak revenue-service fleet counts. Because the number of scheduled standby vehicles directly impacts both operating and capital costs, a guideline for scheduled standby to peak bus counts is provided.

**Policy 14c:
State Fair Fleet**

Vehicles to deliver service improvements for the Minnesota State Fair are not to be counted as part of the fleet to meet the annual maximum service requirement (vehicles operated in annual maximum service – VOMS)

Rationale: The Minnesota State Fair is an atypical or special event, per FTA guidance.

**Policy 14d:
Expansion Buses**

Operating funds for a minimum of three years are to be identified for any expansion fleet prior to initiating the procurement. A fleet management plan that identifies peak vehicle requirements and calculates spare ratio factor with the expansion vehicles must be provided

	<p>with an expansion fleet request.</p> <p>Rationale: Most regional vehicles have a programmed life of 12 years or more. Identification of operating funds justifies the capital investment. The FTA requires a fleet management plan with grant requests for vehicle procurement.</p>						
<p>Policy 15: Metro Mobility Fleet Size</p>	<p>Metro Mobility's fleet size will be determined according to the maximum number of routes operated during the peak periods of March and October. Analysis will be conducted using March and October data to determine the maximum number of routes in operation during each period. The fleet size for each contractor shall be equal to the maximum number of routes at any time during those periods plus a 10-15% spare factor.</p> <p>Rationale: It is the Council's responsibility to provide resources to its Metro Mobility contractors so that all requested trips can be delivered both efficiently and effectively.</p>						
<p>VEHICLE EQUIPMENT AND ANCILLARY ITEMS</p> <p>Policy 16: Fare Collection Equipment</p>	<p>The Council will identify needs and purchase fare collection equipment for all regional providers using a capital account specifically designated for all regional fleet fare-equipment needs. The capital budget for fare collection system purchases will include the cost of installation labor.</p> <p>Rationale: The fare collection system is a regional responsibility and should be coordinated and funded by the Council.</p>						
<p>Policy 17: Standard Bus Configuration</p>	<p>Regional transit providers (suburban transit providers, MTS and Metro Transit) will review and determine standard bus costs and upgraded technology at least every two years.</p> <p>The Council will consider the following items, by vehicle type, as included in the base vehicle price:</p> <table border="1" data-bbox="667 1312 1436 1450"> <thead> <tr> <th data-bbox="667 1312 1100 1360">Vehicle Type</th> <th data-bbox="1100 1312 1436 1360">Standard Options</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 1360 1100 1409">Coach Bus</td> <td data-bbox="1100 1360 1436 1409">Exhibit A</td> </tr> <tr> <td data-bbox="667 1409 1100 1450">Articulated Transit Bus</td> <td data-bbox="1100 1409 1436 1450">Exhibit B</td> </tr> </tbody> </table>	Vehicle Type	Standard Options	Coach Bus	Exhibit A	Articulated Transit Bus	Exhibit B
Vehicle Type	Standard Options						
Coach Bus	Exhibit A						
Articulated Transit Bus	Exhibit B						

Hybrid Transit Bus	Exhibit C
40' Transit Bus	
30' Transit Bus	Exhibit D
Medium-Duty Transit Bus	
Heavier-Duty Small Bus (GVW: >14,500)	Exhibit E
Light-Duty Small Bus (GVW: ≤14,500)	Exhibit F

The Council will fund buses built to the Council's standard bus configurations (Exhibits A through F). Modifications to these configurations may be approved by the Metropolitan Council's Regional Administrator.

**Policy 18:
Ancillary Items**

The Council will fund ancillary items limited to those listed in the tables below and up to the maximum amount shown. The table below shows January 2009 pricing. Adjustments to these amounts for equipment purchases independent of regional equipment purchased by the Council shall be made according the change in the Producer Price Indexes as listed below, as published by the U.S. Department of Labor, Bureau of Labor Statistics Series ID: Security System Hardware- PCU334310334310
Radio Hardware – PCU3342203342201
Bike Racks - PCU331210331210P

The maximum Council contribution for regional fare collection equipment, AVL and APC equipment will be adjusted to reflect actual purchase prices.

Expansion Buses: Included Ancillary Items

Vehicle/ Service Type	30'/40'/Articulated/ Commuter Coach	*Small Buses Used for Fixed Routes	*Small Buses with No Regional Fare Collection Equip.
Covered Items	<ul style="list-style-type: none"> ▪ Security System AND installation ▪ Radio system AND installation ▪ Fare system hardware installation ▪ Vehicle graphics AND installation ▪ Bike racks AND installation ▪ Regional AVL equipment AND installation ▪ Spare parts / diagnostic equipment 	<ul style="list-style-type: none"> ▪ Security System AND installation ▪ Radio system AND installation ▪ Fare system hardware installation ▪ Vehicle graphics AND installation ▪ Bike racks AND installation ▪ Regional AVL equipment AND installation ▪ Spare parts / diagnostic equipment 	<ul style="list-style-type: none"> ▪ Radio system AND installation ▪ Vehicle graphics AND installation ▪ Security System AND installation ▪ Spare parts / diagnostic equipment
Max. Council Contribution	\$35,500	\$35,500	\$10,000

Optional Item	▪ APC equipment AND installation	▪ APC equipment AND installation	▪ AVL/MDC Equipment AND installation
Max. Council Contribution	\$5,000	\$5,000	\$5,000

**Policy 18:
Ancillary Items
(continued)**

Replacement Buses: Included Ancillary Costs

Vehicle/ Service Type	30'/40'/Articulated/ Commuter Coach	*Small Buses Used for Fixed Routes	*Small Buses with No Regional Fare Collection Equip./DAR Service
Covered Items	<ul style="list-style-type: none"> ▪ Security System AND installation ▪ Radio system AND installation ▪ Fare system hardware and installation ▪ Vehicle graphics AND installation ▪ Bike racks AND installation ▪ Regional AVL equipment AND installation ▪ Spare parts / diagnostic equipment 	<ul style="list-style-type: none"> ▪ Security System installation ▪ Radio system installation ▪ Fare system hardware and installation ▪ Vehicle graphics AND installation ▪ Bike rack installation ▪ Regional AVL installation ▪ Spare parts / diagnostic equipment 	<ul style="list-style-type: none"> ▪ Radio system installation ▪ Vehicle graphics AND installation ▪ Security System installation ▪ Spare parts / diagnostic equipment
Max. Council Contribution	\$35,500	\$6,000	\$1,500
Optional Item	▪ APC equipment AND installation	▪ APC equipment installation	▪ AVL/MDC equipment installation
Max. Council Contribution	\$5,000	\$500	\$500

* Small buses, with replacement cycles of 5 or 7 years, are assumed to use existing ancillary equipment for two consecutive vehicle cycles. The cost covered shall use the Expansion Bus figures for every other replacement cycle to assure that ancillary equipment is used for at least 10 years before replacement.

STANDARD VEHICLE CONFIGURATIONS

Exhibit A: 45' Coach Bus

1. Engine Size/Type

The engine shall be designed to operate for not less than 500,000 miles without major failure or deterioration. The engine shall be designated as "Heavy Duty" for use in a mass transit application. The engine shall be sized such that performance and fuel economy are maximized and operating costs and capital costs are minimized.

2. Transmission

The transmission shall be multiple-speed, automatic shift with torque converter, retarder and electronic controls with a heavy-duty transit application. Gross input power, gross input torque and rated input speed shall be compatible with the engine. The diesel transmission shall be designed to operate for not less than 500,000 miles on the design operating profile without replacement or major service. Brand name and specs shall be compatible to the engine chosen.

3. Engine block heater

Special equipment or procedures may be employed to start the engine when exposed to temperatures less than 30°F, for a minimum of four hours without the engine in operation. All cold-weather engine-heating devices shall be of the type recommended by the engine manufacturer and approved by the procuring agency.

4. Cooling System

The engine shall be cooled by a water-based, pressure-type cooling system that does not permit boiling or coolant loss during normal vehicle operation. The system shall be of sufficient size to maintain all engine and transmission fluids and intake air at a safe, continuous temperature. The cooling system will maintain a safe and operable temperature range during the most severe operations possible and in accordance with the engine and transmission manufacturers' cooling-system requirements. The cooling fan should engage when any fluid is above safe operating temperature.

5. Brakes

Service brakes shall be controlled and actuated by a compressed air system, and shall meet FMVSS 121 requirements. A microprocessor-controlled ABS system shall be provided. The entire brake system, including friction material shall have a minimum overhaul or replacement life of 30,000 miles with a brake retarder on operating profile. Brakes shall be self-adjusting throughout this period. Wheel bearings and seals shall be replaceable and should not leak or weep lubricant for at least 100,000 miles.

6. Suspension

The suspension system shall permit a minimum wheel travel of 3 inches jounce upward travel of a wheel when the bus hits a bump. Suspensions shall incorporate appropriate devices for automatic height control, so that regardless of load the bus height does not deviate more than ½ inch from center line. Shock absorbers shall be used to dampen bus motion and variable road conditions. Shock absorbers shall maintain their effectiveness for at least 50,000 miles.

7. Frame and Body

The preferred chassis material is stainless steel and the upper frame components may be stainless steel, corrosion-protected aluminum or corrosion-protected carbon steel. Exterior body panels shall be corrosion protected aluminum, composite material or stainless steel.

8. Bumpers

The bumpers shall provide impact protection for the front and rear of the bus. Bumper height shall be such that when one bus is parked behind another, a portion of the bumper faces will contact each other. The front and rear bumper shall not be damaged as a result of an impact of up to 5 MPH. The bumper shall be corrosion-resistant and withstand repeated impacts of up to 5 MPH without sustaining damage.

9. Rust Proofing

The bus shall resist corrosion from atmospheric conditions and road salts. It shall maintain structural integrity and original appearance throughout its service life. All exposed surfaces and the interior surfaces of tubing and other enclosed members shall be protected with corrosion-resistant coatings. All joints and connections of different metals shall be corrosion-resistant and shall be protected from galvanic corrosion.

10. Undercoating

The underside of the bus shall be coated with an appropriate and flame retardant undercoating to protect the undercarriage of the bus from any type of corrosion or fire that may result from road salt or variable weather or road conditions. Corrosion protection materials shall not require inspection or repair more often than bi-annually and should not require cleaning other than from a standard automated bus wash rack.

The following Items are specified to meet the manufacturer's standard:

1. Transit bus amenities to include grab rails, pull cords, destination headers, bus stop enunciators, placard holders (fixed-route buses only)
2. ADA-compliant wheelchair lift or ramp
3. Seats and seat upholstery
4. Exterior body style

5. Flooring style and material
6. Exterior paint finish: Powder white is the standard; no clear coat
7. All interior signage to comply with ADA

Exhibit B:
60' Articulated Transit Bus

1. Engine Size/Type

The diesel engine shall be designed to operate for not less than 300,000 miles without major failure or deterioration. The engine shall be designated as "Heavy Duty" for use in a mass transit application and shall be sized such that performance and fuel economy are maximized and operating costs and capital costs are minimized.

2. Transmission

The transmission shall be multiple-speed, automatic shift with torque converter, retarder and electronic controls for use in a mass transit application. Gross input power, gross input torque and rated input speed shall be compatible with the engine and provide maximum performance and fuel economy. The transmission shall be designed to operate for not less than 300,000 miles on the design operating profile without replacement or major service. Brand name and specs shall be compatible to the engine chosen.

3. Engine Block Heater

Special equipment or procedures may be employed to start the engine when exposed to temperatures less than 30°F, for a minimum of four hours without the engine in operation. All cold-weather engine-heating devices shall be of the type recommended by the engine manufacturer and approved by the procuring agency.

4. Cooling System

The engine shall be cooled by a water-based, pressure type, cooling system that does not permit boiling or coolant loss during normal vehicle operation. The system shall be of sufficient size to maintain all engine and transmission fluids and intake air at a safe, continuous temperature in accordance with the engine and transmission manufacturers' requirements.

5. Brakes

Service brakes shall be controlled and actuated by a compressed-air system. A microprocessor-controlled ABS system shall be provided. The entire brake system, including friction material, shall have a minimum overhaul or replacement life of 30,000 miles with a brake retarder on operating profile. Brakes shall be self-adjusting throughout this period. Wheel bearings and seals shall be replaceable and should not leak or weep lubricant for 100,000 miles.

6. Suspension

Suspensions shall incorporate appropriate devices for automatic height control. Shock absorbers shall be used to dampen bus motion and variable road conditions. Shock absorbers shall maintain their effectiveness for at least 50,000 miles.

7. Frame and Body

The preferred chassis material is stainless steel and the upper frame components may be stainless steel, corrosion-protected aluminum or corrosion-protected carbon steel. Exterior body panels shall be corrosion-protected aluminum, composite material or stainless steel.

8. Bumpers

The bumpers shall provide impact protection for the front and rear of the bus. Bumper height shall be such that when one bus is parked behind another, a portion of the bumper faces will contact each other. The front and rear bumper shall not be damaged as a result of an impact of up to 5 mph. The bumper shall be corrosion-resistant and withstand repeated impacts of up to 5 mph without sustaining damage.

9. Rust Proofing

The bus shall resist corrosion from atmospheric conditions and road salts. It shall maintain structural integrity and original appearance throughout its service life. All exposed surfaces and the interior surfaces of tubing and other enclosed members shall be protected with corrosion-resistant coatings. All joints and connections of different metals shall be corrosion-resistant and shall be protected from galvanic corrosion.

10. Undercoating

The underside of the bus shall be coated with an appropriate and flame-retardant undercoating to protect the undercarriage of the bus from any type of fire or corrosion that may result from road salt or from variable weather or road conditions. Corrosion-protection materials shall not require inspection or repair more often than bi-annually and should not require cleaning other than from a standard automated bus wash rack.

[Delete line space.]The following items are specified to meet the manufacturer's standard:

1. Transit bus amenities to include grab rails, pull cords, destination headers, bus stop enunciators, placard holders (fixed-route buses only)
2. ADA compliant wheelchair lift or ramp
3. Seats and seat upholstery
4. Exterior body style
5. Flooring style and material
6. Exterior paint finish: Powder white is the standard; no clear coat
7. All interior signage to comply with ADA

Exhibit C:

40' Lowfloor Diesel Bus and Hybrid Bus

1. Engine Size/Type

The diesel and hybrid engines shall be designed to operate for not less than 400,000 miles without major failure or deterioration. The engines shall be designated as "Heavy Duty" for use in a mass transit application. The engines shall be sized such that performance and fuel economy are maximized and operating costs and capital costs are minimized.

2. Transmission

The transmission shall be multiple-speed, automatic shift with torque converter, retarder and electronic controls with a heavy-duty transit application. Gross input power, gross input torque and rated input speed shall be compatible with the engine. The diesel transmission shall be designed to operate for not less than 400,000 miles on the design operating profile without replacement or major service.

3. Engine Block Heater

Special equipment or procedures may be employed to start the engine when exposed to temperatures less than 30°F, for a minimum of four hours without the engine in operation. All cold-weather engine-heating devices shall be of the type recommended by the engine manufacturer and approved by the procuring agency.

4. Cooling System

The engine shall be cooled by a water-based, pressure-type cooling system that does not permit boiling or coolant loss during normal vehicle operation. The system shall be of sufficient size to maintain all engine and transmission fluids and intake air at a safe, continuous temperature. The cooling system will maintain a safe and operable temperature range during the most severe operations possible and in accordance with the engine and transmission manufacturers' cooling-system requirements. The cooling fan should engage when any fluid is above safe operating temperature.

5. Brakes

Service brakes shall be controlled and actuated by a compressed air system, and shall meet FMVSS 121 requirements. A microprocessor-controlled ABS system shall be provided. The entire brake system, including friction material, shall have a minimum overhaul or replacement life of 30,000 miles with a brake retarder on operating profile. Brakes shall be self-adjusting throughout this period. Wheel bearings and seals shall be replaceable and should not leak or weep lubricant for at least 100,000 miles.

6. Suspension

The suspension system shall permit a minimum wheel travel of 3 inches jounce upward travel of a wheel when the bus hits a bump. Suspensions shall incorporate appropriate devices for automatic height control, so that regardless of load the bus height does not deviate more than ½ inch from center line. Shock absorbers shall be used to dampen bus motion and variable road conditions. Shock absorbers shall maintain their effectiveness for at least 50,000 miles.

7. Frame and Body

The preferred chassis material is stainless steel and the upper frame components may be stainless steel, corrosion-protected aluminum or corrosion-protected carbon steel. Exterior body panels shall be corrosion protected aluminum, composite material or stainless steel.

8. Bumpers

The bumpers shall provide impact protection for the front and rear of the bus. Bumper height shall be such that when one bus is parked behind another, a portion of the bumper faces will contact each other. The front and rear bumper shall not be damaged as a result of an impact of up to 5 MPH. The bumper shall be corrosion-resistant and withstand repeated impacts of up to 5 MPH without sustaining damage.

9. Rust Proofing

The bus shall resist corrosion from atmospheric conditions and road salts. It shall maintain structural integrity and original appearance throughout its service life. All exposed surfaces and the interior surfaces of tubing and other enclosed members shall be protected with corrosion-resistant coatings. All joints and connections of different metals shall be corrosion-resistant and shall be protected from galvanic corrosion.

10. Undercoating

The underside of the bus shall be coated with an appropriate and flame retardant undercoating to protect the undercarriage of the bus from any type of fire or corrosion that may result from road salt or variable weather or road conditions. Corrosion protection materials shall not require inspection or repair more often than bi-annually and should not require cleaning other than from a standard automated bus wash rack.

[Delete line space.]The following items are specified to meet the manufacturer's standard:

1. Transit bus amenities to include grab rails, pull cords, destination headers, bus stop enunciators, placard holders (fixed-route buses only)
2. ADA compliant wheelchair lift or ramp
4. Seats and seat upholstery
5. Exterior body style

6. Flooring style and material
7. Exterior paint finish: Powder white is the standard; no clear coat
8. All interior signage to comply with ADA

Exhibit D:**30' Transit Bus and Medium-Duty Transit Bus****1. Engine Size/Type**

The engine shall be designed to operate for not less than 300,000 miles without major failure or deterioration. The engine shall be designated as "Heavy Duty" for use in a mass transit application.

2. Transmission

The transmission shall be multiple-speed, automatic shift with torque converter, retarder and electronic controls with a heavy-duty transit application. Gross input power, gross input torque and rated input speed shall be compatible with the engine. The transmission shall be designed to operate for not less than 300,000 miles on the design operating profile without replacement or major service.

3. Engine Block Heater

Special equipment or procedures may be employed to start the engine when exposed to temperatures less than 30°F, for a minimum of four hours without the engine in operation. All cold-weather engine-heating devices shall be of the type recommended by the engine manufacturer and approved by the procuring agency.

4. Cooling System

The engine shall be cooled by a water-based, pressure-type cooling system that does not permit boiling or coolant loss during normal vehicle operation. The system shall be of sufficient size to maintain all engine and transmission fluids and intake air at a safe, continuous temperature. The cooling system will maintain a safe and operable temperature range during the most severe operations possible and in accordance with the engine and transmission manufacturers' cooling-system requirements. The cooling fan should engage when any fluid is above safe operating temperature.

5. Brakes

Service brakes shall be controlled and actuated by a compressed air system and shall meet FMVSS 121 requirements. A microprocessor-controlled ABS system shall be provided. The entire brake system, including friction material shall have a minimum overhaul or replacement life of 30,000 miles with a brake retarder on operating profile. Brakes shall be self-adjusting throughout this period. Wheel bearings and seals shall be replaceable and should not leak or weep lubricant for at least 100,000 miles.

6. Suspension

Suspensions shall incorporate appropriate devices for automatic height control. Shock absorbers shall be used to dampen bus motion and variable road conditions. Shock absorbers shall maintain their effectiveness for at least 50,000 miles.

7. Frame and Body

The preferred chassis material is stainless steel and the upper frame components may be stainless steel, corrosion-protected aluminum or corrosion protected carbon steel. Exterior panels shall be corrosion-protected aluminum, composite material or stainless steel.

8. Bumpers

The bumpers shall provide impact protection for the front and rear of the bus. Bumper height shall be such that when one bus is parked behind another, a portion of the bumper faces will contact each other. The front and rear bumper shall not be damaged as a result of an impact of up to 5 MPH. The bumper shall be corrosion-resistant and withstand repeated impacts of up to 5 MPH without sustaining damage.

9. Rust Proofing

The bus shall resist corrosion from atmospheric conditions and road salts. It shall maintain structural integrity and original appearance throughout its service life. All exposed surfaces and the interior surfaces of tubing and other enclosed members shall be protected with corrosion-resistant coatings. All joints and connections of different metals shall be corrosion-resistant and shall be protected from galvanic corrosion.

10. Undercoating

The underside of the bus shall be coated with an appropriate and flame retardant undercoating to protect the undercarriage of the bus from any type of fire or corrosion that may result from road salt or variable weather or road conditions.

[Delete line space.]The following items are specified to meet the manufacturer's standard:

1. Transit bus amenities to include grab rails, pull cords, destination headers, bus stop enunciators, placard holders (fixed-route buses only)
2. ADA compliant wheelchair lift or ramp
4. Seats and seat upholstery
5. Exterior body style
6. Flooring style and material
7. Exterior paint finish: Powder white is the standard; no clear coat
8. All interior signage to comply with ADA

**Exhibit E:
Heavier-Duty Small Bus**

1. Engine Size/Type

The engine shall be designed to operate for not less than 250,000 miles without major failure or deterioration. The engine shall be designated as "Heavy Duty" for use in a mass transit application.

2. Transmission

The transmission shall be multiple-speed, automatic shift with torque converter, retarder and electronic controls with a heavy-duty transit application. Gross input power, gross input torque and rated input speed shall be compatible with the engine. The transmission shall be designed to operate for not less than 250,000 miles on the design operating profile without replacement or major service. Transmission brand name and specs shall be compatible to the engine chosen.

3. Engine Block Heater

Special equipment or procedures may be employed to start the engine when exposed to temperatures less than 30°F, for a minimum of four hours without the engine in operation. All cold-weather engine-heating devices shall be of the type recommended by the engine manufacturer and approved by the procuring agency.

4. Cooling System

The engine shall be cooled by a water based, pressure-type cooling system that does not permit boiling or coolant loss during normal vehicle operation. The system shall be of sufficient size to maintain all engine and transmission fluids and intake air at a safe, continuous temperature. The cooling system will maintain a safe and operable temperature range during the most severe operations possible and in accordance with the engine and transmission manufacturers' cooling-system requirements. The cooling fan should engage when any fluid is above safe operating temperature.

5. Brakes

Service brakes shall be controlled and actuated by a hydraulic disc system. A microprocessor-controlled ABS system shall be provided. The entire brake system, including friction material, shall have a minimum overhaul or replacement life of 30,000 miles. Brakes shall be self-adjusting throughout this period. Wheel bearings and seals shall be replaceable and should not leak or weep lubricant for 100,000 miles.

6. Suspension

The suspension system shall permit a minimum wheel travel of 3 inches jounce upward travel of a wheel when the bus hits a bump. Suspensions shall incorporate appropriate devices for automatic height control, so that regardless of load, the bus height does not deviate more than ½ inch from center line. Shock absorbers shall be used to dampen bus motion and variable road conditions. Shock absorbers shall maintain their effectiveness for at least 50,000 miles.

7. Stainless Steel Where Practical

Stainless steel options should be provided during option selection. Possible uses for this type of material would be framing, skirting, lower body panels, rivets, screws and body detailing.

8. Bumpers

The bumpers shall provide impact protection for the front and rear of the bus. Bumper height shall be such that when one bus is parked behind another, a portion of the bumper faces will contact each other. The front and rear bumper shall not be damaged as a result of an impact of up to 5 mph. The bumper shall be corrosion-resistant and withstand repeated impacts of up to 5 mph without sustaining damage.

9. Rust Proofing

The bus shall resist corrosion from atmospheric conditions and road salts. It shall maintain structural integrity and original appearance throughout its service life. All exposed surfaces and the interior surfaces of tubing and other enclosed members shall be protected with corrosion-resistant coatings. All joints and connections of different metals shall be corrosion-resistant and shall be protected from galvanic corrosion.

10. Undercoating

The underside of the bus shall be coated with an appropriate and flame retardant undercoating to protect the undercarriage of the bus from any type of fire or corrosion that may result from road salt or variable weather or road conditions.

[Delete line space.]The following items are specified to meet the manufacturer's standard:

1. Transit bus amenities to include grab rails, pull cords, destination headers, bus stop enunciators, placard holders (fixed-route buses only)
2. ADA compliant wheelchair lift or ramp
3. Seats and seat upholstery
4. Exterior body style
5. Flooring style and material
6. Exterior paint finish: Powder white is the standard; no clear coat
7. All interior signage to comply with ADA

**Exhibit F:
Light-Duty Small Bus**

1. Engine Size/Type

The engine shall be designed to operate for not less than 200,000 miles without major failure or deterioration. The engine shall be designated as "Heavy Duty" for use in a mass transit application.

2. Transmission

The transmission shall be multiple-speed, automatic shift with torque converter, retarder and electronic controls with a heavy-duty transit application. Gross input power, gross input torque and rated input speed shall be compatible with the engine. The transmission shall be designed to operate for not less than 200,000 miles on the design operating profile without replacement or major service. Transmission brand name and specs shall be compatible to the engine chosen.

3. Engine Block Heater

Special equipment or procedures may be employed to start the engine when exposed to temperatures less than 30°F, for a minimum of four hours without the engine in operation. All cold-weather engine-heating devices shall be of the type recommended by the engine manufacturer and approved by the procuring agency.

4. Cooling System

The engine shall be cooled by a water-based, pressure-type cooling system that does not permit boiling or coolant loss during normal vehicle operation. The system shall be of sufficient size to maintain all engine and transmission fluids and intake air at a safe, continuous temperature. The cooling system will maintain a safe and operable temperature range during the most severe operations possible and in accordance with the engine and transmission manufacturers' cooling-system requirements. The cooling fan should engage when any fluid is above safe operating temperature.

5. Brakes

Service brakes shall be controlled and actuated by a hydraulic disc system. A microprocessor-controlled ABS system shall be provided. The entire brake system, including friction material shall have a minimum overhaul or replacement life of 30,000 miles. Brakes shall be self-adjusting throughout this period. Wheel bearings and seals shall be replaceable and should not leak or weep lubricant for 100,000 miles.

6. Suspension

The suspension system shall permit a minimum wheel travel of 3 inches jounce upward travel of a wheel when the bus hits a bump. Suspensions shall incorporate appropriate devices for automatic height control, so that regardless of load, the bus height does not deviate more than ½ inch from center line. Shock absorbers shall be used to dampen bus motion and variable road conditions. Shock absorbers shall maintain their effectiveness for at least 50,000 miles.

7. Stainless Steel Where Practical

Stainless steel options should be provided during option selection. Possible uses for this type of material would be framing, skirting, lower body panels, rivets, screws and body detailing.

8. Bumpers

The bumpers shall provide impact protection for the front and rear of the bus. Bumper height shall be such that when one bus is parked behind another, a portion of the bumper faces will contact each other. The front and rear bumper shall not be damaged as a result of an impact of up to 5 MPH. The bumper shall be corrosion resistant and withstand repeated impacts of up to 5 MPH without sustaining damage.

9. Rust Proofing

The bus shall resist corrosion from atmospheric conditions and road salts. It shall maintain structural integrity and original appearance throughout its service life. All exposed surfaces and the interior surfaces of tubing and other enclosed members shall be protected with corrosion-resistant coatings. All joints and connections of different metals shall be corrosion-resistant and shall be protected from galvanic corrosion.

10. Undercoating

The underside of the bus shall be coated with an appropriate and flame retardant undercoating to protect the undercarriage of the bus from any type of fire or corrosion that may result from road salt or variable weather or road conditions.

[Delete line space.]The following items are specified to meet the manufacturer's standard:

1. Transit bus amenities to include grab rails, pull cords, destination headers, bus stop enunciators, placard holders (fixed-route buses only)
2. ADA compliant wheelchair lift or ramp
3. Seats and seat upholstery
4. Exterior body style
5. Flooring style and material
6. Exterior paint finish: Powder white is the standard; no clear coat
7. All interior signage to comply with ADA

PROCEDURES FOR PROCUREMENTS

May 2010

INTRODUCTION

The Metropolitan Council periodically passes through Federal Transit Administration (FTA) funds to replacement service providers established pursuant to Minnesota Statutes, section 473.388, commonly referred to as “Suburban Transit Providers.” When FTA funds are passed through to a Suburban Transit Provider, the Suburban Transit Provider as the subgrantee is primarily responsible for meeting all applicable federal requirements associated with the receipt of federal funds including, without limitation, all federal procurement requirements. These responsibilities apply to all FTA-funded purchases including, without limitation, the procurement of rolling stock, architectural and engineering services, professional/technical services, construction services, and goods. FTA’s contracting guidance is found in FTA Circular 4220.1F.

While the Suburban Transit Providers have the primary responsibility for meeting the described federal requirements, the Metropolitan Council as the initial recipient of the grant funds also has a continuing responsibility to monitor subgrantee compliance with applicable FTA requirements. The Council already has procedures in place for the monitoring of subrecipient compliance with FTA requirements. These procedures also apply to Suburban Transit Providers and are set out in this document.

It is important to note that despite the Council’s monitoring activities under these procedures, the Suburban Transit Provider as a subgrantee of federal funds continues to have the primary responsibility for meeting all applicable federal requirements for procurement. As such, the Council strongly urges each Suburban Transit Provider to include relevant staff in development of procurement documents including, in particular, legal staff that represent the Suburban Transit Provider itself.

APPLICATION OF PROCEDURES

Suburban Transit Providers will follow the Council’s Project Procurement procedures below when issuing procurements involving FTA funds.

There are other types of procurements where the full Project Procurement procedures would not apply. These are procurements (listed below) where Suburban Transit Providers do not solicit offers but which may be compliant with funding requirements. In these procurements, Suburban Transit Providers will forward the Subrecipient Contract Initiation Memo to the Project Manager and will discuss proper procedures with the Project Manager.

Piggybacking

“Piggybacking” is an assignment to existing contract rights to purchase supplies, equipment or services. Suburban Transit Providers must be able to determine that the contract to be piggybacked meets funding requirements. Particular attention must be given to the specific issues identified in the FTA Piggybacking Worksheet. A piggybacking assignment can be led either jointly or by the Council.

Intergovernmental Procurement Agreements

Suburban Transit Providers can utilize available state and local intergovernmental agreements for procurement of goods and services if all state requirements, required clauses, and certifications are met.

Joint Procurement

Several agencies may consolidate their requirements into one procurement. Suburban Transit Providers can participate in joint procurements if all federal requirements, required clauses, laws and certifications are followed and are included in the resulting joint solicitation and contract documents.

Sole Source

When the goods or services are available from only one source, documentation of the sole source purchase must include the justification and the authorization to award the sole source contract. A cost analysis must be performed to determine if the price is fair and reasonable.

MAXIMUM TIMELINES

The maximum timelines for Council turnaround in reviewing procurement documents are listed below. The maximum times apply only to Council staff reviews and do not apply to actions needed by others such as FTA.

Pre-Solicitation

Review Subrecipient Contract Initiation Memo (SCIM), Independent Cost Estimate (ICE) and draft solicitation document including specifications and sample contract within ten (10) business days.

Pre-Contract Execution

Complete DBE compliance checks within ten (10) business days as a general rule. Certain projects may require additional time in order to complete the DBE checks due to a large number of proposers and/or the potential for reconsideration hearings.

Contract Administration

Review proposed contract changes within ten (10) business days.

Note that other procurement activities can proceed during these reviews, so that the overall procurement time is not necessarily increased by the number of business days stated above. The above times exclude non-Council actions by FTA, TAB or MnDOT and other parties which may have other timeline requirements.

MONITORING PROCEDURES

Project Authorization

- The Council sends subrecipient the notification letter with monitoring requirements attached.
 - A-133 form, Certifications and Assurances, environmental documentation, and other application materials are retained in the Council's project file.
 - Once all application materials are received, Council's Grants Manager submits application to FTA.
- Federal notice of award received; Council's Grants Manager issues Notice of Grant Award to the Council's Project Manager.
- Council and subrecipient execute an interagency grant agreement to implement the project.

Project Procurement

- Procurements by subrecipients of \$50,000 or more require review and approval by Council's Purchasing and Office of Diversity and Equal Opportunity (ODEO) prior to issuance for review of compliance with FTA requirements.
 - Subrecipient submits a Subrecipient Contract Initiation Memo (SCIM) and an Independent Cost Estimate (ICE) to the Council Project Manager, who forwards them to Council's Grants, Purchasing, and Office of Diversity and Equal Opportunity (ODEO) for review and approval.
 - Subrecipient submits a draft solicitation document to the Council Project Manager, who forwards to Council's Purchasing and ODEO for review and approval.
 - Solicitation is issued by subrecipient.
 - Subrecipient submits all proposals or bids received to the Council Project Manager who forwards them to ODEO for the DBE compliance check.
 - Copies of executed contracts are sent to the Council Project Manager who forwards a copy to Council Purchasing.
 - All contract amendments (financial and non-financial) require prior review and approval by Council Project Manager who will forward to Council Purchasing, and ODEO as appropriate.

Post-Procurement

- Subrecipient submits four copies of each invoice packet to Council Project Manager, who forwards copies to Council's Grants, ODEO, and Finance for review and approval.
- All subrecipient procurements are subject to Council audit and review to check for compliance with FTA requirements.

- Council Project Manager has primary responsibility for monitoring subrecipient compliance (Compliance Checklist for Mandatory FTA Procurement Standards attached)
- Council’s Program Evaluation and Audits will conduct periodic random audit and review of subrecipient procurements

In addition, the Council may have certain minimum requirements that must be included in contracts involving Council-owned assets, e.g., buses must have minimum warranty coverage and requirements related to indemnification/insurance/bonding.

The Council will offer periodic training sessions for Suburban Transit Providers on FTA requirements, as well as assistance on an as-needed basis.

The cost of Council personnel time and materials may, at the Council’s discretion, be deducted from the amount of the grant award or funding awarded to the subrecipient.

The following compliance checklist is provided for the convenience of subgrantees and contains only an outline of federal procurement requirements. The compliance checklist does not purport to contain all federal requirements to which a subgrantee may be subject as a subrecipient of federal grant funds. The subgrantee remains responsible for conforming its procurement processes to all applicable federal requirements for federal funds passed through from the Council, notwithstanding the Council’s review above and the following compliance checklist.

**Compliance Checklist
Mandatory FTA Procurement Standards
FTA Circular 4220.1F**

No.	Element
1)	Written Standards of Conduct
2)	Contract Administration System
3)	Written Protest Procedures
4)	Prequalification System
5)	System for Ensuring Most Efficient and Economic Purchase
6)	Procurement Policies and Procedures
7)	Independent Cost Estimate
8)	A&E Geographic Preference
9)	Unreasonable Qualification Requirements
10)	Unnecessary Experience and Excessive Bonding
11)	Organizational Conflict of Interest
12)	Arbitrary Action
13)	Brand Name Restrictions
14)	Geographic Preferences
15)	Contract Period of Performance Limitation
16)	Written Procurement Selection Procedures
17)	Solicitation Prequalification Criteria

18)	Award to Responsible Contractors
19)	Sound and Complete Agreement
20)	No Splitting [Micro-purchase]
21)	Fair and Reasonable Price Determination [Micro-purchase]
22)	Micro-Purchase Davis Bacon
23)	Price Quotations [Small Purchase]
24)	Clear, Accurate, and Complete Specification
25)	Adequate Competition - Two or More Competitors
26)	Firm Fixed Price [Sealed Bid]
27)	Selection on Price [Sealed Bid]
28)	Discussions Unnecessary [Sealed Bid]
29)	Advertised/Publicized
30)	Adequate Solicitation
31)	Sufficient Bid Time [Sealed Bid]
32)	Bid Opening [Sealed Bid]
33)	Responsiveness [Sealed Bid]
34)	Lowest Price [Sealed Bid]
35)	Rejecting Bids [Sealed Bid]
36)	Evaluation [RFP]
37)	Price and Other Factors [RFP]
38)	Sole Source if Other Award is Infeasible
39)	Cost Analysis Required [Sole Source]
40)	Evaluation of Options
41)	Cost or Price Analysis
42)	Written Record of Procurement History
43)	Exercise of Options
44)	Out of Scope Changes
45)	Advance Payments
46)	Progress Payments
47)	Time and Materials Contracts
48)	Cost Plus Percentage of Cost
49)	Liquidated Damages Provisions
50)	Qualifications Exclude Price [A&E]
51)	Serial Price Negotiations [A&E]
52)	Bid Security [Construction over \$100,000]
53)	Performance Security [Construction over \$100,000]
54)	Payment Security [Construction over \$100,000]

This procedure may be periodically reviewed and revised.

FACILITIES OWNERSHIP POLICY

May 2010

INTRODUCTION

Transit facilities are necessary to deliver transit service. This includes passenger facilities such as park-and-rides, transit stations, and transit centers as well as support facilities such as garages and maintenance buildings. Some regional transit facilities are located in areas served by replacement service providers established pursuant to Minnesota Statutes, section 473.388, commonly referred to as “Opt-Outs.”

FACILITY OWNERSHIP

Transit facilities, including those that are part of a commuter rail, light rail, busway or bus rapid transit line, may be owned by an Opt-Out or other public entity such as a city or county with the following provisions:

1. State and federal law and regulations regarding ownership will always prevail. Ownership requirements or conditions associated with funding sources, such as Counties Transit Improvement Board funds, will prevail.
2. Facility use, operation and maintenance must be consistent with all regional transit policies including, but not limited to, regional transit fares, parking fees, allowing access to the general public, and allowing use by any regional transit provider.
3. The Council or other public transit entity may contract with another transit provider for transit services that serve a transit facility, including one located in an opt-out area. The Council or other public transit entity must coordinate with the facility owner to ensure coordinated operations. The facility owner may require a facility maintenance agreement when the other provider(s) services make up 25% or more of the trips serving the facility.
4. The facility owner is responsible for routine operation and maintenance per the schedule below, insurance and indemnification, unless agreed to otherwise.
5. If a facility is part of a rail transitway and not owned by the Council, the Council or transitway operator must have a rail platform operating lease agreement with the facility owner. This agreement must address the legal relationship between the operator and owner, operation and maintenance responsibilities, insurance and indemnification.
6. Standard regional transitway branding and advertising, if applicable as determined by the Council, must be incorporated into the facility.
7. Any “use” revenues generated under a facility lease, use contract or permit with a vendor, must first be applied to the routine operations and maintenance of the facility; any excess lease or use revenues shall be applied to transit operations (mandatory with CTIB capital or operating funding participation), or to the capital expansion and/or maintenance of the facility.

ROUTINE OPERATION AND MAINTENANCE SCHEDULE

- A. Public Utilities – gas; electric; sewer/water/street lighting
- B. Private Utilities – phone
- C. Contracted Services (routine operational or minor maintenance type)
 - 1. Security monitoring and/or patrol
 - 2. Lawn care/landscaping
 - 3. Snowplowing and removal
 - 4. Waste removal
 - 5. HVAC repair
 - 6. Site/building lighting & electrical maintenance and repair
 - 7. Plumbing/mechanical maintenance and repair
 - 8. Site/parking deck sweeping
 - 9. Janitorial/pest control services
 - 10. Signage repair/installation
 - 11. Elevator maintenance and annual hydraulic test
 - 12. Glass replacement
 - 13. Annual parking structure wash down

LONG-TERM MAINTENANCE AND CAPITAL IMPROVEMENT SCHEDULE

- 1. Architectural/Engineering services (site/infrastructure inspections and recommendations)
- 2. Concrete & Asphalt roadway repair/rehabilitation/replacement
- 3. Concrete (parking) structure repair/rehabilitation/replacement
- 4. Building envelope (roof/windows/curtain wall/doors, etc.) & mechanical/electrical infrastructure repair/rehabilitation/replacement
- 5. Site improvements (development/landscaping/drainage, etc.)
- 6. Security improvements (site/parking deck/bus way lighting, CCTV installations, gates & fencing)

This policy may be periodically reviewed and revised.