

INSTRUCTIONS TO TRANSIT SYSTEMS

ANYTHING IN RED IN THE RFP OR THE MAINTENANCE RESPONSE FORM NEEDS TO BE ADDRESSED BY THE TRANSIT SYSTEM.

- Some areas are for information and comment. The system can include, change, or delete these.
- All areas in RED must be removed prior to issuing the RFP

RECOMMENDED - YOUR FINANCE OFFICE / PROCUREMENT OFFICER OR ATTORNEY REVIEW – this is a template

It is the intent of this RFP that you will award contracts to **SEVERAL** vendors for each maintenance service **AND** then get informal quotes for the services based on the labor rate and percent MSRP discount from the vendors you have qualified for that service. **ALWAYS DOCUMENT and keep the information!** It is intended that you manage the cost of each and every repair and your overall maintenance budget. We hope you will receive some discount on parts **AND** must use prevailing wage rates, as submitted on response form.

1. Replace preventive maintenance information
 - If the Transit System has an approved maintenance plan (reviewed by NCDOT and approved by governing board), replace the information in RFP and checklist in Appendix H
 - Can add an Appendix I that includes entire approved maintenance plan
 - Review and change the response form of activities – for example, the names and types of preventive maintenance work
2. Insurance
 - NC Statute requires workman's comp. to be provided in organizations that have 3 or more employees. They also required automobile liability insurance for individuals. You might be better with garage keeper's liability insurance.
 - **Suggested ideas under the insurance section BUT need to be changed to reflect your local circumstances.**
3. Advertisement requirements for ARRA
 - Be sure to advertise with local, major newspapers, a minority newspaper, and the State's IPS. See Below for IPS Instructions
 - Require affidavit of publication with invoice and save in project folder
 - Advertisement in template form –. Hoping Mike McCoy will approve Ad template so do not have to have ads approved again.
4. DBE – if find DBE's, mail rfp. Also, mail RFP to Contractors that currently perform work for you. <https://apps.dot.state.nc.us/vendor/directory/default.aspx#0> **Print listing of DBEs you found and then included in your solicitation or print sheet that none were found.**
5. Track all Contractors receiving RFP in spreadsheet – name, contact name, address, phone, email,
6. Create a bid tabulation of all bids received, record tabulations for each committee member and note status – award, deny, and submit to NCDOT with the sample contract you will use in the award. *We will send you a sample tab sheet, sample contract AND review checklist.*

PLEASE NOTE THAT IF USING ARRA FUNDS, YOU CANNOT PURCHASE ITEMS FROM STATE CONTRACT (eg TIRES).

SELECTION COMMITTEE needs to be established and made of a minimum of 3 people or other odd numbered increments.

IF NOT USING ARRA Funds, remove that section!

IPS – for everyone but non-profit systems

- Contact Peggy Crawley at P&C to get instructions on how to register to the IPS. Her phone number is 919-807-4502 or you can email her at peggy.crawley@doa.nc.gov

URL to IPS: <https://www.ips.state.nc.us/ips/agency/logon.asp>

Login id: **“enter login id”**

Password: **“enter password”**

Requirements for posting are:

Bids posted for the “Enter Entity Name” MUST start with the prefix Code listed below: Prefix Code “Enter Entity Code” is a 30 character alphanumeric field were we has just used 4 characters (the “-“ is considered a character) – do not use spaces.

The rest of the bid number is whatever you wish to use. It is important to NOT use spaces as stated below.

NOTE: The system does not allow Bid Openings & Mandatory Site Visits on Federal Holidays.

NOTE: All Recovery Bids MUST include the attached Contract Provisions included in the posted document

Learn about OERI directives -- Important Link

Bids for recovery funds must include (RECOVERY FUNDS) at the end of the bid description EXAMPLE: ECONOMIC RECOVERY AWARENESS CAMPAIGN (RECOVERY FUNDS)

URL To Open Document in Word: <http://www.pandc.nc.gov/Documents/ContractProvisions.doc>

ARRA Bids (regardless of bid type) should always be “Recover Funds” as listed below:

Documents must be in “pdf” format for posting.

URL to On Line Assistance: <http://www.pandc.nc.gov/OnlineEducation/index.html> (User’s Manual attached in PDF format)

NOTE: The features that must be completed in IPS in order for the Stimulus tracking are:

Post Bids or Post Design/Construction to IPS --- both have a new bid type field for Recovery Funds that must be selected for Stimulus

Post Tab to the internet after the bid opening – not there are two (2) types of tabs) Item or Vendor totals

Bid Award or Bid Cancel

NOTE: Normally bids should be awarded and or cancelled within 30 to 45 days from opening date.

With the Governor’s new NC OpenBook Policy (<http://www.ncopenbook.gov/>)

IPS awards are now made public (<http://www.ncopenbook.gov/contracts/default.aspx>)

URL to Agency Purchasing Manual: <http://www.pandc.nc.gov/documents/wholeapm.pdf>

URL to Commodity Listings: <http://www.pandc.nc.gov /ipsalpha.htm>

URL to Templates samples if you elect to use them: <http://www.pandc.nc.gov/divforms.htm>

URL to PUBLIC of IPS: <https://www.ips.state.nc.us/ips/> -- please use to verify that you document is posted.

URL to Recovery Funds: <http://ncrecovery.gov/>