

What to Expect When Procuring an ITS Solution

Are You Ready to Take the Plunge?

We know that diving into the procurement process can be overwhelming, so we've made a guide to help you navigate through all the stages.

1 Identify the Need in Your Operation

Top Reasons for Needing New Technology or a Technology Upgrade:

- Your existing technology is nearing end of life or no longer meets your needs
- FTA or DOT puts out new reporting or technology requirements
- Losing out on funding due to inability to capture and report on key data, such as revenue miles
- Customer service is suffering due to poor routing
- Mounting costs due to poor routing and asset utilization
- Over-stretched resources

Procurement Guide

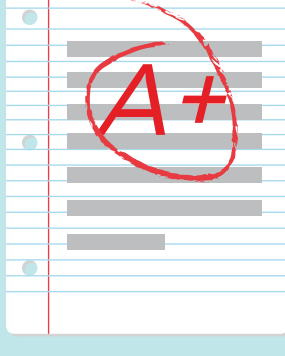


2 List All Your Requirements

Don't know what you're looking for? Meet with all your internal stakeholders, including council, administrative staff and drivers, to discuss your current challenges. Be as descriptive and detailed as possible. Being able to distinguish between your needs and your wants will help you get optimal cost estimates for your project.

3 Do Your Homework

You are not alone; other operators are facing the same challenges that you are. Vendors can put you in touch with other operators that faced similar challenges. Learning how their needs were addressed with technology can help you see how the solution may work for your operation.



4 Determine Your Budget

Shop around to learn what all the vendors offer, and at what price.

It's a good idea to determine the upper limit of what you may need to spend to fully address your needs, and apply for funding for that amount. This will allow you greater flexibility in your choices later in the RFP process. It's better to keep your options open than to lock yourself into a low-cost option.

5 Identify Funding Sources

There are a limited number of funding sources available, which may limit what technology you are able to initially purchase. However, it is important to consider how often you can apply for funding. There may be opportunities to apply for grants at regular intervals, and new sources of funding may become available.

Think about your future; it's worthwhile to consider solutions that can scale up with you as your operation grows and as funding becomes available.



6 Internal Alignment

Before moving on to the RFP stage, it's crucial to ensure that everyone is on the same page. Ideally, all stakeholders will have been consulted when determining challenges and requirements. The earlier you bring stakeholders into the process, the less resistant to change they will be – because they have helped to shape the RFP.

Tip: Getting buy-in from all stakeholders before the RFP is developed will result in a smoother implementation and better acceptance of the new technology when it is rolled out.

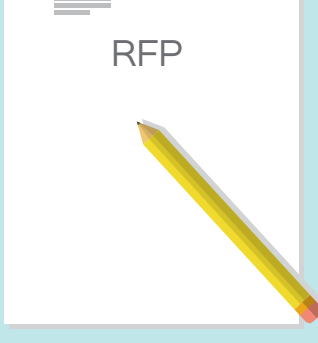


7 Develop RFP

Time for all your preparation to pay off! The research you performed earlier can help shape and direct your RFP writing. When writing your RFP, make sure to be clear on which requirements are mandatory vs. optional. Vague requirements can lead to vendors bidding higher cost estimates to compensate for the unknown. Remember that once the RFP is released, you will no longer be able to have direct contact with any prospective vendors.

Tip: Your local DOT may have resources to help you with developing an RFP.

Tip: Check out other operators' RFPs to see what they included in theirs.



8 Release the RFP

Good job making it this far; you've made it past the hardest part! Now it's time to let the responses pour in.

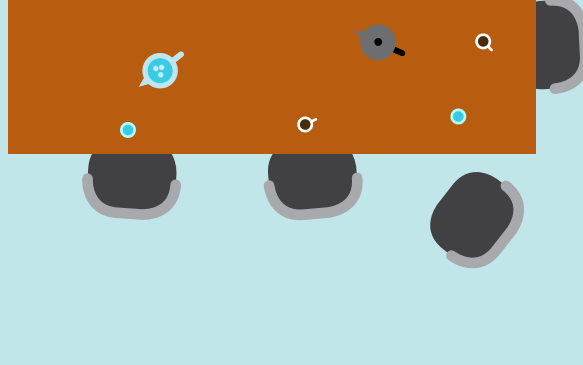
Note: Remember that once your RFP has been released you may no longer have any ongoing communications with vendors outside of the pre-bid meetings, formal question period, or vendor interviews.



9 Pre-bid Meetings (optional)

Pre-bid meetings are an optional step in the procurement process that gives vendors the opportunity to perform a site check and clarify questions about technical specifications.

Note: You can either provide answers to inquiries as they are received or release the answers all at once after the close date for questions.



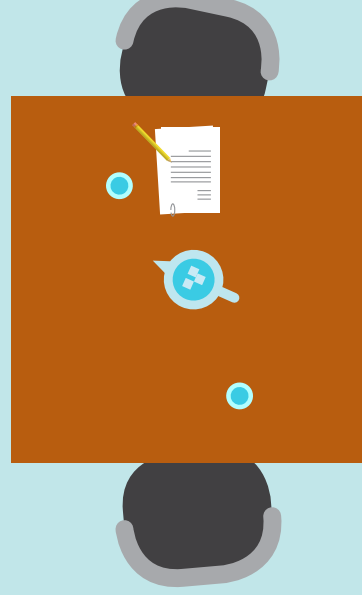
10 Close Date

Alright, so all the bids are in. Read over the details and create a shortlist of vendors you would like to hear from again. It's important that you get input from all your stakeholders when determining who can best meet your needs.

11 Vendor Interview (optional)

You may give vendors an opportunity for a final presentation of their technology solution.

Tip: Provide the presenting vendors with a list of questions that you want them to address during their presentation. Be sure to allow enough time to fully evaluate their solution. You've just spent a lot of time getting to this point, it doesn't make sense to rush through the final presentation stage.



12 Evaluations and Decisions

You're almost done; it's time to make your decision and take the plunge! Combining all the input and research you have gathered so far, evaluate the options in front of you and make the best choice for your operation.

13 Award Date

Congratulations on making it to the end of the procurement process!



A Perfect 10!

Following all the steps of the procurement process is worth the effort.

Keep this resource handy to ensure you're not skimming past any steps. By doing your research, talking to the right people and asking the right questions, you'll be able to procure a solution that addresses your needs, and get top scores with the judges – your internal stakeholders and riders!

Are you looking for more? Check out these other awesome resources:

1. [Top Funding Application Mistakes and How to Avoid Them](#)
2. [Finding Funding at the State and Federal Levels](#)
3. [How RTAP Helps Rural, Urban and Tribal Transit Sites](#)