Caltrans Division of Mass Transportation  
Elderly and Disabled Specialized Transit, FTA Section 5310  
Grant-funded Purchasing Process for Non-Profit Agencies

I. Ordering Process:

1) Contact Caltrans, Procurement and Grants Management Branch, Robert Jackson at (916) 654-8631 to begin the Purchase Agreement (PA) and floor plan development process.

2) The itemized PA should include the following:
   ♦ All appropriate fees required DMV costs, etc.
   ♦ Ensure the non-taxable ADA amount is correct and the appropriate sales tax rate for your area is used.
   ♦ Contain the reference, “requires Caltrans inspection.”
   ♦ Identify the lienholder as:
     California Department of Transportation  
     Mass Transportation 5310 Program  
     P.O. Box 942874 – MS39  
     Sacramento, CA  94274-0001

3) The agency signs and dates the finalized PA and floor plan and submits them to Robert Jackson.

4) Caltrans procurement branch will work with Caltrans 5310 grant staff to verify the following:
   ♦ The total amount of grant dollars awarded and available to your agency.
   ♦ The local share amount required from the agency deposited in the designated Bank of America account, instructions provided by Caltrans.
   ♦ Grant staff must work with procurement staff to ensure DGS fees will be covered in the grant amount.
   ♦ If a Standard Agreement (SA) amendment is required; the amendment shall be completed prior to purchase document submission to the vendor.

   Note: Vehicles will not be ordered until the entire local share has been deposited. If the vehicle exceeds the grant amount as identified in the grant SA (grant amount plus local share), the agency must deposit the additional funds with the Bank of America.

5) Once the finalized PA and floor plan have been reviewed and approved by the agency, and step 4 is completed, Caltrans will sign and forward to the dealer.

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6) Caltrans purchasing office will then generate a purchase order to the vendor for the vehicles

II. Delivery and Inspections

1) All vehicles purchased with federal funds must have an inspection prior to the agency’s acceptance. After the bus has been built and delivered to the dealer, the dealer will contact Caltrans for inspection services.

2) Caltrans must be listed as lienholder on all purchases.

3) In accordance with the terms of the SA, the agency must provide proof of insurance to the dealer prior to the agency receiving the vehicle.

4) For all deliveries, the agency must also inspect the vehicle before vehicle acceptance. The agency should request assistance/training from the dealer's staff regarding any bus feature with which the agency is unfamiliar.

5) The agency is responsible to check the loose items, such as tie down restraints, spare tire, torso pad, and any additional loose equipment, which was ordered with the bus to ensure all items have been included and received.