Washington State Department of Transportation

Public transportation policy templates

Policy Template 1: Purchasing policy

September 2026

Public Transportation Division

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PT1 Purchasing policy

PT1.1 About this document

WSDOT developed this document to provide you with a resource for implementing a purchasing policy for your organization. This document includes a non-editable purchasing policy template. For an editable template, reach out to the WSDOT contact listed on your grant agreement.

It's a requirement that all organizations awarded WSDOT Public Transportation Division grants maintain written purchasing policies (sometimes called purchasing procedures or procurement policies) for all purchases of goods and services (Federal Transit Administration (FTA) Circular 4220.1G; FTA Best Practices Procurement and Lessons Learned Manual (Report 105); RCW 39.26.120; RCW 39.26.125). For more information about purchasing policies, see the Public Transportation Grant Guidebook, Chapter 1: Requirements for all projects, Section 1.14: Purchasing policies.

This template doesn't supersede any WSDOT Public Transportation Division grant agreement. If any sections of this template are inconsistent with the terms and conditions of your agreement, follow the agreement.

PT1.2 Purchasing policy template

PT1.2.1 Graduated purchasing authority

WSDOT guidance: Authorization thresholds are at the discretion of the agency.

ABC Transit staff must receive authorization to make purchases. The following list shows the authorizations staff must receive for these graduated purchase amounts:

- Petty cash (under $100): authorization from the general manager (GM), a GM-authorized staff member, or administrative assistant.
- Products and services that cost less than $3,000: authorization from the GM or a GM-authorized staff member.
- Products and services that cost between $3,000 and $50,000: authorization from the GM.
- Products and services that cost more than $50,000: authorization from the board of trustees.

PT1.2.2 Methods of procurement

Note: Purchasing directly from an approved cooperative procurement contract (e.g., Washington State Department of Enterprise Services) satisfies competitive procurement requirements.

Note: Procurement thresholds in this template (i.e., micro-purchases, simplified acquisitions, large procurements) are the FTA's current thresholds as of publication.

PT1.2.2.1 Micro-purchases

ABC Transit must use the following protocols for procurements less than or equal to $15,000:

- Equitably distribute purchases among qualified suppliers.
- Do not divide related purchases to stay under the micro-purchase limit.
- Maintain required documentation:
    - Document that ABC Transit determined that the purchase price was fair and reasonable (based on research, experience, purchase history, etc.) with a description of how ABC Transit made this determination.

PT1.2.2.2 Simplified acquisitions (i.e., small purchases)

ABC Transit must use the following procedure for procurements greater than $15,000 but less than $350,000:

- Obtain documented price or rate quotations from an adequate number of qualified sources.

WSDOT guidance: WSDOT recommends at least three when possible.

- Avoid requiring unreasonable qualifications and specific brand names.
- Avoid specifying geographic preference.
- Do not divide related purchases to stay under the simplified acquisition limit.
- Maintain required documentation:
    - Maintain records to support ABC Transit's decision to use the simplified acquisition procedure, selection of contract type, sources solicited, and reasons for contractor selection.
    - Document that ABC Transit determined the purchase price to be fair and reasonable (based on research, experience, purchase history, etc.) with a description of how ABC Transit made this determination.

PT1.2.2.3 Large procurements

ABC Transit must use the following procedure for procurements of $350,000 or more:

- Conduct a formal bid process adhering to all FTA procurement requirements (including Buy America): request for proposals (RFP), sealed bids, architectural and engineering (A&E) services, etc. (See FTA Circular 4220.1G, or as amended).
- Avoid requiring unreasonable qualifications and specific brand names.
- Avoid specifying geographic preference.
- Ensure vehicle and equipment procurements are publicly solicited and vehicle and equipment specifications follow the full and open competition principle (FTA Best Practices Procurement and Lessons Learned Manual 2.4) and do not restrict competition.
- Perform an independent cost estimate for any non-commercially available, off-the-shelf, or custom products.
- Maintain required documentation:
    - Maintain records to support ABC Transit's decision to use the selected acquisition procedure, solicitation documentation, number of bids received, and the reasons for contractor selection.
    - Document that the purchase price is fair and reasonable (based on cost or price analysis) with a description of how ABC Transit made this determination.

PT1.2.2.4 Sole source (i.e., other than full and open competition)

ABC Transit must use the following procedure when only one source can fulfill the requirements of the purchase (i.e., noncompetitive award):

- Solicit offers from as many potential sources as is practical under the circumstances.
- Provide written justification of the decision for the procurement as included under 2 CFR 200.318(i).

  Note: WSDOT's sole source justification documentation form is available in the WSDOT Public Transportation Division Grants Management System document repository.

- Maintain required documentation:
  - Perform a cost or price analysis if the procurement will exceed the simplified acquisition threshold.
  - For smaller sole source acquisitions, document that ABC Transit determined that the purchase price was fair and reasonable (based on research, experience, purchase history, etc.) with a description of how ABC Transit made this determination.

PT1.2.3 Appeal and protest procedures

Any bidder or contractor who is aggrieved in connection with an ABC Transit solicitation or award of a bid or contracted products and services may file an appeal with ABC Transit. Bidders or contractors may submit an appeal of an award to the GM using the following appeal procedure:

- The bidder or contractor must submit an appeal no later than five business days after notification of the bid award. The GM must receive such appeals no later than 5 p.m. within five days of notice of the award postmark date.
  - All appeals must be in writing and signed by the bidder or an authorized agent of the bidder.
  - The appeal must include the name and address of the bidder or contractor.
  - The appeal must include a detailed description of the facts and disagreement that form the basis of the bidder or contractor's appeal and supporting documentation and the specific decision requested.
  - The bidder or contractor must promptly provide any additional documentation related to the appeal upon request from the GM.

- The GM or authorized representative of ABC Transit will provide the appealing bidder or contractor with a written decision within five business days after receipt of the appeal.
    - Decision by the GM of ABC Transit is final.
    - The GM must notify the bidder or contractor of any delay in developing the written decision if ABC Transit and the bidder or contractor mutually agree that more time is needed.
- Failure to follow the appeal procedure will render an appeal untimely or inadequate and result in rejection by ABC Transit.

In the case where WSDOT-grant funds are being used for the purchase, the bidder or contractor may further file a protest of the decision that resulted from the appeal procedure to WSDOT. The protest to WSDOT must include a detailed description of the facts and disagreement that form the basis of the bidder or contractor's protest and supporting documentation, and the specific decision the bidder or contractor is requesting.

WSDOT guidance: Some agencies choose to incorporate their required ethics policy here. Many keep their ethics policy as a separate, stand-alone document that complements the procurement policy.

PT1.2.4 Agencies receiving federal funds

Agreements between ABC Transit and a contractor must comply with all federal requirements and include FTA clauses and certifications in third-party contracts.

English

Title VI Notice to Public

It is the Washington State Department of Transportation's (WSDOT) policy to assure that no person shall, on the grounds of race, color, national origin, as provided by Title VI of the Civil Rights Act of 1964, be excluded from participation in, be denied the benefits of, or be otherwise discriminated against under any of its programs and activities. Any person who believes his/her Title VI protection has been violated, may file a complaint with WSDOT's Office of Equity and Civil Rights (OECR). For additional information regarding Title VI complaint procedures and/or information regarding our non-discrimination obligations, please contact OECR's Title VI Coordinator at (360) 705-7090.

Americans with Disabilities Act (ADA) Information

This material can be made available in an alternate format by emailing the Office of Equity and Civil Rights at wsdotada@wsdot.wa.gov or by calling toll free, 855-362-4ADA(4232). Persons who are deaf or hard of hearing may make a request by calling the Washington State Relay at 711.

Español

Notificación de Titulo VI al Público

La política del Departamento de Transporte del Estado de Washington (Washington State Department of Transportation, WSDOT) es garantizar que ninguna persona, por motivos de raza, color u origen nacional, según lo dispuesto en el Título VI de la Ley de Derechos Civiles de 1964, sea excluida de la participación, se le nieguen los beneficios o se le discrimine de otro modo en cualquiera de sus programas y actividades. Cualquier persona que considere que se ha violado su protección del Título VI puede presentar una queja ante la Oficina de Equidad y Derechos Civiles (Office of Equity and Civil Rights, OECR) del WSDOT. Para obtener más información sobre los procedimientos de queja del Título VI o información sobre nuestras obligaciones contra la discriminación, comuníquese con el coordinador del Título VI de la OECR al (360) 705-7090.

Información de la Ley sobre Estadounidenses con Discapacidades (ADA, por sus siglas en inglés)

Este material puede estar disponible en un formato alternativo al enviar un correo electrónico a la Oficina de Equidad y Derechos Civiles a wsdotada@wsdot.wa.gov o llamando a la línea sin cargo 855-362-4ADA(4232). Personas sordas o con discapacidad auditiva pueden solicitar la misma información llamando al Washington State Relay al 711.

한국어-Korean

제 6 조 관련 공지사항

워싱턴 주 교통부(WSDOT)는 1964 년 민권법 타이틀 VI 규정에 따라, 누구도 인종, 피부색 또는 출신 국가를 근거로 본 부서의 모든 프로그램 및 활동에 대한 참여가 배제되거나 혜택이 거부되거나, 또는 달리 차별받지 않도록 하는 것을 정책으로 하고 있습니다. 타이틀 VI 에 따른 그/그녀에 대한 보호 조항이 위반되었다고 생각된다면 누구든지 WSDOT 의 평등 및 민권 사무국(OECR)에 민원을 제기할 수 있습니다. 타이틀 VI 에 따른 민원 처리 절차에 관한 보다 자세한 정보 및/또는 본 부서의 차별금지 의무에 관한 정보를 원하신다면, (360) 705-7090 으로 OECR 의 타이틀 VI 담당자에게 연락해주십시오.

미국 장애인법(ADA) 정보

본 자료는 또한 평등 및 민권 사무국에 이메일 wsdotada@wsdot.wa.gov 을 보내시거나 무료 전화 855-362-4ADA(4232)로 연락하셔서 대체 형식으로 받아보실 수 있습니다. 청각장애인은 워싱턴주 중계 711 로 전화하여 요청하실 수 있습니다.

русский-Russian

Раздел VI Общественное заявление

Политика Департамента транспорта штата Вашингтон (WSDOT) заключается в том, чтобы исключить любые случаи дискриминации по признаку расы, цвета кожи или национального происхождения, как это предусмотрено Разделом VI Закона о гражданских правах 1964 года, а также случаи недопущения участия, лишения льгот или другие формы дискриминации в рамках любой из своих программ и мероприятий. Любое лицо, которое считает, что его

средства защиты в рамках раздела VI были нарушены, может подать жалобу в Ведомство по вопросам равенства и гражданских прав WSDOT (OECR). Для дополнительной информации о процедуре подачи жалобы на несоблюдение требований раздела VI, а также получения информации о наших обязательствах по борьбе с дискриминацией, пожалуйста, свяжитесь с координатором OECR по разделу VI по телефону (360) 705-7090.

Закон США о защите прав граждан с ограниченными возможностями (ADA)

Эту информацию можно получить в альтернативном формате, отправив электронное письмо в Ведомство по вопросам равенства и гражданских прав по адресу wsdotada@wsdot.wa.gov или позвонив по бесплатному телефону 855-362-4ADA(4232). Глухие и слабослышащие лица могут сделать запрос, позвонив в специальную диспетчерскую службу штата Вашингтон по номеру 711.

tiếng Việt-Vietnamese

Thông báo Khoản VI dành cho công chúng

Chính sách của Sở Giao Thông Vận Tải Tiểu Bang Washington (WSDOT) là bảo đảm không để cho ai bị loại khỏi sự tham gia, bị từ khước quyền lợi, hoặc bị kỳ thị trong bất cứ chương trình hay hoạt động nào vì lý do chủng tộc, màu da, hoặc nguồn gốc quốc gia, theo như quy định trong Mục VI của Đạo Luật Dân Quyền năm 1964. Bất cứ ai tin rằng quyền bảo vệ trong Mục VI của họ bị vi phạm, đều có thể nộp đơn khiếu nại cho Văn Phòng Bảo Vệ Dân Quyền và Bình Đẳng (OECR) của WSDOT. Muốn biết thêm chi tiết liên quan đến thủ tục khiếu nại Mục VI và/hoặc chi tiết liên quan đến trách nhiệm không kỳ thị của chúng tôi, xin liên lạc với Phối Trí Viên Mục VI của OECR số (360) 705-7090.

Thông tin về Đạo luật Người Mỹ tàn tật (Americans with Disabilities Act, ADA)

Tài liệu này có thể thực hiện bằng một hình thức khác bằng cách email cho Văn Phòng Bảo Vệ Dân Quyền và Bình Đẳng wsdotada@wsdot.wa.gov hoặc gọi điện thoại miễn phí số, 855-362- 4ADA(4232). Người điếc hoặc khiếm thính có thể yêu cầu bằng cách gọi cho Dịch vụ Tiếp âm Tiểu bang Washington theo số 711.

Arabic - الع َربِيَّة

في ضمان عدم استبعاد أي شخص، على أساس العرق أو اللون أو االصل القومي من المشاركة في أي من (WSDOT) إشعار للجمهور تتمثل سياسة وزارة النقل في والية واشنطن 6العنوان ويمكن ألي شخص 1964.برامجها وأنشطتها أو الحرمان من الفوائد المتاحة بموجبها أو التعرض للتمييز فيها بخالف ذلك، كما هو منصوص عليه في الباب السادس من قانون الحقوق المدنية لعام للحصول على معلومات إضافية بشأن إجراءات . التابع لوزارة النقل في والية واشنطن(OECR)يعتقد أنه تم انتهاك حقوقه التي يكفلها الباب السادس تقديم شكوى إلى مكتب المساواة والحقوق المدنية أو بشأن التزاماتنا بعدم التمييز بموجب الباب السادس، يرجى االتصال بمنسق الباب/الشكاوى و السادس في مكتب المساواة والحقوق المدنية على الرقم 7090-705 (360).

معلومات قانون االمريكيين ذوي اإلعاقة (ADA)

:أو عن طريق االتصال بالرقم المجاني wsdotada@wsdot.wa.gov يمكن توفير هذه المواد في تنسيق بديل عن طريق إرسال رسالة بريد إلكتروني إلى مكتب المساواة والحقوق المدنية على يمكن لألشخاص(4232) 855-362-4ADA
على الرقم Washington State Relay الصم أو ضعاف السمع تقديم طلب عن طريق االتصال بخدمة 711.

中文 – Chinese

《权利法案》Title VI 公告

<華盛頓州交通部(WSDOT)政策規定，按照《1964　年民權法案》第六篇規定，確保無人因種族、膚色或國籍而被排除在 WSDOT 任何計畫和活動之外，被剝奪相關權益或以其他方式遭到歧視。如任何人認為其第六篇保護權益遭到侵犯，則可向 WSDOT 的公平和民權辦公室(OECR)提交投訴。如需關於第六篇投訴程式的更多資訊和/或關於我們非歧視義務的資訊，請聯絡 OECR 的第六篇協調員，電話 (360) 705-7090。

《美国残疾人法案》(ADA)信息

可向公平和民權辦公室發送電子郵件 wsdotada@wsdot.wa.gov 或撥打免費電話

855-362-4ADA(4232)，以其他格式獲取此資料。听力丧失或听觉障碍人士可拨打 711 联系 Washington 州转接站。

Af-soomaaliga – Somali

Ciwaanka VI Ogeysiiska Dadweynaha

Waa siyaasada Waaxda Gaadiidka Gobolka Washington (WSDOT) in la xaqiijiyo in aan qofna, ayadoo la cuskanaayo sababo la xariira isir, midab, ama wadanku kasoo jeedo, sida ku qoran Title VI (Qodobka VI) ee Sharciga Xaquuqda Madaniga ah ah oo soo baxay 1964, laga saarin ka qaybgalka, loo diidin faa'iidooyinka, ama si kale loogu takoorin barnaamijyadeeda iyo shaqooyinkeeda. Qof kasta oo aaminsan in difaaciisa Title VI la jebiyay, ayaa cabasho u gudbin kara Xafiiska Sinaanta iyo Xaquuqda Madaniga ah (OECR) ee WSDOT. Si aad u hesho xog dheeraad ah oo ku saabsan hanaannada cabashada Title VI iyo/ama xogta la xariirta waajibaadkeena ka caagan takoorka, fadlan la xariir Iskuduwaha Title VI ee OECR oo aad ka wacayso (360) 705-7090.

Macluumaadka Xeerka Naafada Marykanka (ADA)

Agabkaan ayaad ku heli kartaa qaab kale adoo iimeel u diraaya Xafiiska Sinaanta iyo Xaquuqda Madaniga ah oo aad ka helayso wsdotada@wsdot.wa.gov ama adoo wacaaya laynka bilaashka ah, 855-362-4ADA(4232). Dadka naafada maqalka ama maqalku ku adag yahay waxay ku codsan karaan wicitaanka Adeega Gudbinta Gobolka Washington 711.

Translation Services

If you have difficulty understanding English, you may, free of charge, request language assistance services by calling 360-705-7921 or email us at: PubTrans@wsdot.wa.gov

Español - Spanish

Servicios de traducción

Aviso a personas con dominio limitado del idioma inglés: Si usted tiene alguna dificultad en entender el idioma inglés, puede, sin costo alguno, solicitar asistencia lingüística con respecto a esta información llamando al 360-705-7921, o envíe un mensaje de correo electrónico a: PubTrans@wsdot.wa.gov

tiếng Việt-Vietnamese

các dịch vụ dịch thuật

Nếu quý vị không hiểu tiếng Anh, quý vị có thể yêu cầu dịch vụ trợ giúp ngôn ngữ, miễn phí, bằng cách gọi số 360-705-7921 hoặc email cho chúng tôi tại: PubTrans@wsdot.wa.gov

한국어-Korean

번역 서비스

영어로 소통하는 것이 불편하시다면, 360-705-7921 으로 전화하시거나 다음 이메일로 연락하셔서 무료 언어 지원 서비스를 요청하실 수 있습니다: PubTrans@wsdot.wa.gov

русский-Russian

Услуги перевода

Если вам трудно понимать английский язык, вы можете запросить бесплатные языковые услуги, позвонив по телефону 360-705-7921 или написав нам на электронную почту: PubTrans@wsdot.wa.gov

Arabic - اَلْعَرَبِيَّةُ

الترجمة دمات خ

عن اللغوية المساعدة خدمات طلب ًنا مجا فيمكنك ،الإنجليزية اللغة فهم في صعوبة تجد كنت إذا

الإلكتروني البريد عبر مراسلتنا أو 360-705-7921 بالرقم الاتصال يق طر:PubTrans@wsdot.wa.gov

Af-soomaaliga - Somali

Adeegyada Turjumaada

Haddii ay kugu adag tahay inaad fahamtid Ingiriisida, waxaad, bilaash, ku codsan kartaa adeegyada caawimada luuqada adoo wacaaya 360-705-7921 ama iimayl noogu soo dir: PubTrans@wsdot.wa.gov

中文 – Chinese

翻译服务

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