

39657 - 2027-2029 Pierce Transit Consolidated Operating Grant--Runner (Puyallup)

Application Details

Funding Opportunity:	38336-2027-2029 Consolidated Grant Program - Operating
Funding Opportunity Due Date:	Sep 9, 2026 3:01 PM
Program Area:	Consolidated Grant Program
Status:	Submitted
Stage:	Final Application
Initial Submit Date:	Sep 8, 2026 9:20 AM
Initially Submitted By:	Peter Paul Camacho
Last Submit Date:	
Last Submitted By:	

Contact Information

Primary Contact Information

Name:	Salutation	Erin	E	Hoiland
	First Name	Middle Name	Last Name	
Title:	Grants Administrator			
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Address*:	3701 96th St SW			
	Lakewood	Washington	98499-____	
	City	State/Province	Postal Code/Zip	
Phone*:	(253) 983-3437			
Fax:				

Organization Information

Legal Name*:	Pierce County Public Transportation Benefit Area Corporation
DBA Name*:	Pierce Transit
Organization Type*:	Transit Agency ? Large Urban
Organization Website:	(Please enter http://... for this field)
SAM UEI #:	QACHE3STYGK3
Physical Address*:	3701 96th St SW
	Lakewood Washington 98499-4431
	City State/Province Postal Code/Zip
Mailing Address*:	3701 96th St SW

Remit to Address*:

Lakewood Washington 98499-4431
City State/Province Postal Code/Zip
3701 96th St SW

Phone*:

Lakewood Washington 98499-4431
City State/Province Postal Code/Zip
(253) 984-8200 Ext.

Fax:**Fiscal Year End**

December

Last day of*:**Indirect Cost Rate:**

0.00%

IDR Expiration Date:

Organization Contact Information

Organization Contact Information

Organization Director*:

Mike Griffus
First Name Last Name
Chief Executive Officer mgriffus@piercettransit.org
Title Email Address

Applicant Contact*:

Erin Hoiland
First Name Last Name
Grants Administrator ehoiland@piercettransit.org
Title Email Address

Project Contact:

Sarah Streiffert
First Name Last Name
Specialized Transportation Administrator sstreiffert@piercettransit.org
Title Email Address

Summary of Project Information

Summary of Project Information

Refer to the glossary in the [Public Transportation Grant Guidebook](#) for service-type definitions.

Service Type*:

Demand-response
Select all that apply

Need for Service*:

Continuing service (new to this grant program)
Expansion can't be combined with sustaining existing service within the same application for the first biennium.
NOTE: Sustain existing service is the only project type eligible for a 4-year term.

Checking "Yes" for federal funds means that your organization is willing and able to comply with the associated federal requirements, such as federal drug and alcohol testing procedures, Title VI activities, and federal small business enterprise (FSBE) requirements. For examples of federal requirements from last biennium, refer to the [Public Transportation Grant Guidebook](#).

Willing to Accept FTA funds for the biennium*:

Yes

If project is a purchase-of-service type, the eligible funding source and match rate may be affected.

Is this a purchase-of-service project?:

Yes

If your organization has proof of 501(c) nonprofit status, the project may be eligible for state paratransit special needs competitive funds.

Does your organization have 501(c) nonprofit status?:

No

Choose the congressional district(s), legislative district(s), and county(ies) this project will serve (include the entire project area).

[Congressional & Legislative District map](#)

Congressional District(s) Select as many as apply *:	10
Legislative District(s) Select as many as apply *:	25
County(ies) Select as many as apply *:	Pierce

Scope of Work

Scope of Work

Select the [Regional Transportation Planning Organization \(RTPO\)](#) / [Metropolitan Planning Organization \(MPO\)](#) that will be ranking this project from the drop-down menu.

RTPO/MPO*: Puget Sound Regional Council

Project Summary (Scope)

Provide a brief, high-level description of what your project proposes to do (address what the project is, whom it serves, and where the service occurs).

This summary will be used in your grant agreement and may also be used to describe your project to the Legislature.

Proposed summary/scope of work*:

Pierce Transit is proposing to fund operation of a new Runner microtransit zone under the Consolidated Grant Program for the following people with accessibility and mobility needs: youth, people with disabilities, older adults aged 65+, and families with low incomes—specifically the Puyallup Runner which serves the City of Puyallup.

Project Description

Provide a detailed description of the tasks, activities, and deliverables your project will complete. Your narrative should reflect the full life of the project and demonstrate how the proposed activities align with the grant program's goals.

Description of project*:

This project requests \$2,849,984 of WSDOT Consolidated Grant funding over two years to continue Pierce Transit's Puyallup Runner, the on-demand microtransit service serving the City Puyallup. Launched as a pilot through Pierce Transit's 2023-2027 WSDOT Regional Mobility Grant (PTD-0763), the Puyallup Runner supplements the agency's fixed-route service and provides first- and last-mile connections to Routes 4, 400, 402, and 409, improving access to transit and supporting seamless connections for people with accessibility and mobility needs including youth, people with disabilities, older adults (65+), and low-income families.

The 17.5 sq. mi. microtransit zone serves an estimated 58,600 residents and 29,100 jobs where 14% of residents identify as living with a disability and 5% of households that are car-free (US Census). The zone encompasses key transit corridors and destinations such as the SR 161/Meridian corridor, SR-512 corridor, Puyallup Sounder Station, South Hill Mall Transit Center, South Hill Park & Ride, multiple senior living facilities, Good Samaritan Hospital, South Hill Mall, Washington State Fair, Walmart, and Pierce College Puyallup. The Puyallup Runner advances the Consolidated Grant Program's goals by connecting riders to fixed-route services by expanding access to employment, education, healthcare, shopping, and other essential destinations within the city of Puyallup and across the Puget Sound region.

Project Need

Why is this project needed, and how does this proposal address the need? How would the community be affected if the grant is not awarded?

Include a description of the transportation problem that aligns with the need identified in the Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP). Explain how the problem was identified and describe how the proposed project will address it.

Need*:

Significant transportation gaps remain in the Puyallup Runner Zone not served by fixed routes or ADA Paratransit Shuttle (Att.1). Bus stops may be a mile or more from rider origin or destination, making fixed-route transit impractical for youth, people with disabilities, older adults (65+), and households without vehicle access (Att.2). Runner closes these gaps by extending on-demand service beyond the ADA-required ¾-mile complementary paratransit service area, connecting riders who would otherwise face limited or impractical transit options.

Gaps were identified through the Pierce College Puyallup Campus Master Plan Traffic Impact Analysis (2021), coordination with City of Puyallup staff, consultation with Pierce Transit's Community Transportation Advisory Group, and internal staff. These findings supported the launch of

Puyallup Runner in Nov. 2023. Gaps widened when underperforming Route 425 and the eastern portion of Route 409 were retired in March 2024 but were covered by Runner.

Demand has grown 83%, from 14,603 boardings in 2024 to 26,654 by mid-2026 (Att. 3). Fixed-route ridership on Routes 4, 400, 402, and 409 also increased (Att.4).

This project will maintain Puyallup Runner service, addressing PSRC CPT-HSTP (Att.5) needs for demand-response and specialized transportation (p.34) which identify microtransit and Runner as critical regional mobility components (pp.46,102). Without grant funding, capacity will not meet demand, limiting access to essential services.

Area Served

Is this project primarily serving a rural area?: No
Any service that supports public transportation in rural areas with populations less than 50,000.

Is this project primarily serving the Seattle, Tacoma, Everett urbanized area?: Yes

Special Needs Transportation

To be eligible for special needs transportation funding, applicants must address how their project advances the efficiency in, accessibility to, or coordination of transportation services provided to persons with special transportation needs, as defined in RCW 81.66.010(3).

Does this project advance efficiencies in, accessibility to, or coordination of special needs transportation?: Yes

Describe how your project advances these areas, and the approach you are using to achieve these improvements. Additionally, identify the special needs population(s) to be served by this project.

Special Needs Transportation:

Pierce Transit's Puyallup Runner supplements fixed-route service and provides first- and last-mile connections to Routes 4, 400, 402, & 409. This microtransit service expands access for riders with accessibility and mobility needs and who face barriers to fixed-route service, serving seniors age 65+, youth, people with disabilities, and low-income families within the City of Puyallup. See Att. 2 for demographic data.

Seniors Age 65+: Runner accepts ORCA RRFP, providing eligible seniors with affordable transportation throughout the Puget Sound region.

Youth: Pierce Transit's Youth Ride Free program allows riders 18 and under to ride fixed route and Runner at no cost. Runner supports transportation to school, home, and after-school activities, offering flexibility when students miss their school bus or need travel outside standard schedules.

People with Disabilities: The Runner zone has access to a wheelchair-accessible vehicle with ADA features, including ramps and mobility device securements. Flexible, on-demand, door-to-door service increases mobility for individuals with limited accessible transportation options. Runner also complements ADA paratransit by providing a real-time option when reservations or same-day availability may limit trips.

Low-Income Families: Runner accepts ORCA LIFT, making service more affordable for individuals and families with household incomes at or below 200% of the federal poverty level. Affordable, flexible transportation helps residents reach employment, healthcare, education, shopping, and other essential services while reducing transportation cost barriers.

Puyallup Runner also fills gaps created when Route 425 and the eastern portion of Route 409 were retired. By serving areas with limited fixed-route coverage, Runner provides safe, reliable, transportation when riders need it most, strengthening Pierce Transit's specialized transportation network and access to essential destinations for residents with diverse mobility needs.

Project Staff

Provide the names of the key staff who will be working on this project, along with their years of experience and relevant qualifications. Include their experience managing similar projects, with specific attention to responsibilities for grant financial management, budget oversight, documentation, and compliance.

Project Staff*:

Sarah Streiffert, Specialized Transportation Administrator, has more than 22 years of experience managing public transportation services, including over two years of direct microtransit experience. She will provide overall project oversight and ensure project activities are effectively coordinated and implemented. Sarah serves as the primary point of contact that works directly with Via to provide microtransit services in Pierce County.

Erin Hoiland, Grants Administrator, has more than 30 years of experience writing and managing public and private grants. She will oversee all aspects of grant administration, including managing grant documentation, fulfilling of reporting requirements, ensuring compliance with grant

conditions, federal, state, and agency regulations, and coordinating of grant-related requirements.

Peter Paul Camacho, Grants Coordinator, has more than seven years of experience writing and managing grants. He will support grant administration, documentation, reporting, and compliance activities and assist the Grants Administrator with monitoring project requirements.

Christina Morrison, Finance Supervisor, has more than 40 years of financial experience. She is responsible for processing grant claims and reimbursements through WSDOT's Grant Management System (GMS) and will provide financial oversight, including monitoring expenditures, claims, reimbursements, and supporting documentation to ensure compliance with grant requirements.

Relationship to Other Projects

Relationship to Other Projects

Is this project dependent on any other projects submitted by your organization?* No

Did you, or will you, apply for this project in another grant program this biennium?* No

Have you applied for the same project in a prior biennium and did not receive funding?* No

Are you applying for other projects within this funding opportunity?* Yes

List all project applications for this funding opportunity, including this project, in order of priority*:

Applications are being submitted by Pierce Transit (PT) to the WSDOT 2027-29 Consolidated Grant Program for the following operating projects (including this project) listed in order of priority:

1. 2027-2031 Pierce Transit Consolidated Operating Grant-Runner (Spanaway/Gig Harbor/Ruston/Tideflats) (Four-Year Project)
2. 2027-2029 Pierce Transit Consolidated Operating Grant-Puyallup Runner (Two-Year Project) (This Application)

Planning and Coordination

Coordinated Public Transit - Human Services Transportation Plan

Coordinated Public Transit - Human Services Transportation Plan	Page number(s) or TBD	How is the need in the CPT-HSTP met by this project?
Puget Sound Regional Council	115	Pierce Transit's Runner provides shorter travel times compared to regular fixed route transit. In many cases, waiting for the next bus can take longer than requesting a ride through a demand response service. Runner helps reduce travel time from home to the nearest bus stop, which is critical for riders with accessibility or mobility needs. Runner's door to door service offers the quickest way for many individuals with special transportation needs to reach their destinations.
Puget Sound Regional Council	116	Pierce Transit's Runner provides more transportation services at times when they are needed. Runner hours of operations are from 7am to 10pm daily. Services are offered during high peak and off-peak hours for added flexibility for riders. Shuttle ADA paratransit riders are limited to making travel reservations days in advance from 8am to 5pm, whereas Runner is an on-demand, first come first serve service that can be a viable alternative for anyone with accessibility or mobility needs.
Puget Sound Regional Council	117	Pierce Transit's Runner provides more transportation services at times when they are needed. Runner hours of operations are from 7am to 10pm daily. Services are offered during high peak and off-peak hours for added flexibility for riders. Shuttle ADA paratransit riders are limited to making travel reservations days in advance from 8am to 5pm, whereas Runner is an on-demand, first come first serve service that can be a viable alternative for anyone with accessibility or mobility needs.
Puget Sound Regional Council	120	Runner is an affordable transit alternative compared to Uber or Lyft services. Families with low incomes are able to utilize ORCA Lift cards with Runner. ADA paratransit eligible riders aged 65 and older are able to utilize Regional Reduced Fare Permit (RRFP). Runner fares during all hours of operations remain the same of that as a fixed route bus.

Puget Sound Regional Council	121	The Pierce Transit Runner app and the Runner call center support multiple languages for people with limited English proficiency who want to utilize Runner as their primary or alternate mode of transportation in the Puyallup area. Riders can call 253-600-4146 for language assistance to book a ride with Runner. Travel training is also available for people with accessibility or mobility needs and provides the best instructions on how to best utilize public transit in the PTBA.
Puget Sound Regional Council	122	Pierce Transit's Runner directly addresses the top 3 priorities identified by the priority populations from Phase 2 engagement in that it provides: 1) a more accessible and safer transit infrastructure for older adults and individuals with disabilities; 2) more frequency and expanded service for youth and others with special transportation needs and limited options; 3) shorter wait times for people with transportation accessibility and mobility needs

Cross-region Project

Does this project have a service area that crosses RTPO/MPO planning boundaries?* No

Project Coordination

Describe coordination efforts. Include details such as:

- How is the project reflected in regional plans?
- Which prioritized strategies are being addressed?
- Who was involved in defining the transportation problem?
- Other alternatives considered for addressing the problem.
- Demonstrations of local/regional coordination in implementing the proposed project.

Coordination Efforts*:

Pierce Transit is an active member of the Puget Sound Regional Council (PSRC) Coordinated Mobility and Accessibility Committee (CMAC), which is responsible for advising the Transit Operations Committee on transportation for priority populations in the Puget Sound region. The CMAC serves as the primary forum for technical expertise to inform PSRC's Coordinated Mobility Plan, the region's Coordinated Transit-Human Services Transportation Plan and the development of regional priorities to implement the plan. PSRC's current plan was adopted by PSRC's General Assembly on May 28, 2026. PSRC's Coordinated Mobility Plan (Att. 5) serves as the region's blueprint for planning, funding, and coordinating prioritized strategies that serve people with mobility and accessibility challenges.

Included in this plan are detailed provisions for microtransit and specialized transportation services to include demand response services or mobility on demand (MOD) services like the Runner to be utilized for first and last mile connections to close transportation gaps. Pierce Transit's Runner service is explicitly referenced in the plan as a critical microtransit tool for areas with limited fixed-route options due to lower demand or geographic constraints. As reflected in the previous response, regional mobility needs identified in PSRC's Coordinated Mobility Plan Pierce Transit's Runner is a direct response to the Runner supports regional goals by providing on demand shared rides that strengthen connections to the broader transit network. Today, Runner closes those transportation gaps by providing first/last mile connections to transit systems.

Pierce Transit's Runner is also reflected in the agency's 2026-2031 Transit Development Plan (Att. 6) which describes the present state of the agency and puts forward as six-year implementation plan for the agency's long-range vision.

By selecting yes, you acknowledge that you coordinated or will coordinate this project with the planning organization(s) within the region(s) this project serves*: Yes

How does your project connect to, coordinate with, leverage, or enhance other modes of transportation in your service area (e.g., aviation, intercity bus or rail, park-and-rides, bicycle/pedestrian)?

In your response, include how the multimodal partnerships for this project will improve or enhance access to social services.

What efficiencies will be gained within the service area as a result of this project?

Multimodal Partnerships*:

The Puyallup Runner provides efficient, on-demand connections to key regional multimodal transportation hubs, helping riders seamlessly connect to higher-capacity transit services. The service connects to Sound Transit's Puyallup Station, where riders are able access the S Line commuter rail service to Seattle and Route 578 express bus service to Seattle. The Puyallup Runner also provides connections to the South Hill Park & Ride and the South Hill Mall Transit Center, offering access to Pierce Transit Routes 400, 402, 409, and 4. By providing flexible first- and last-mile connections to these facilities, the Puyallup Runner helps extend the reach of the regional transit network and provides riders with a convenient alternative to driving to major transit connections.

Pierce Transit's Specialized Transportation Administrator (Sarah Streiffert) and ADA Eligibility Assistant Manager (Ausha Potts) meet monthly with Pierce County Human Services' Social Service Program Specialist III (Daeveene May) to coordinate services and address transportation gaps throughout the county. Pierce County operates the Beyond the Borders program, which helps fill service gaps in areas outside Pierce Transit's Public Transit Benefit Area. See enclosed letter of support. To further improve public awareness and access, Pierce Transit and Pierce County have collaborated on interactive maps that identify and highlight the transportation services available throughout Pierce County (Att. 1).

Budget

Duration of Project

Duration of Project*: Two Years

Expenses

Expenses	If Other, List the Expense	** July 1, 2025 - June 30, 2027 (Current Estimate)	July 1, 2027 - June 30, 2029 (Projected)	Variance Between Biennia	** July 1, 2029 - June 30, 2031 (Projected)	Variance Between Biennia
Contracted Services - Transportation		\$2,298,035.00	\$2,999,983.00	30.55%	\$0.00	-100.00%
		\$2,298,035.00	\$2,999,983.00		\$0.00	

Sources of Revenue/Match

Revenue/Match Source	If Other, List the Source	** July 1, 2025 - June 30, 2027 (Current Estimate)	July 1, 2027 - June 30, 2029 (Projected)	** July 1, 2029 - June 30, 2031 (Projected)
Local: Transit Sales Tax		\$264,184.00	\$149,999.00	\$0.00
State: Regional Mobility Grant		\$1,056,737.00	\$0.00	\$0.00

Fares and Donations

Row	July 1, 2025 - June 30, 2027 (Current Estimate)	July 1, 2027 - June 30, 2029 (Projected)	July 1, 2029 - June 30, 2031 (Projected)
Fares and rides donations	\$78,051.00	\$81,494.00	\$0.00

Variances

Variance between 2025-2027 and 2027-2029: 30.55%

Variance between 2027-2029 and 2029-2031: -100.00%

Variances:

The cost variance between FY25-27 and FY27-29 is mainly due to a 26.2% increase in Puyallup Runner service hours in FY 27-29 to meet demand, plus a 3.4% rise in the cost per service hour due to inflation, rising fuel costs, and fees. The variance between FY27-29 and FY29-31 occurs because no grant funds are being requested for FY29-31 as this project is a new Consolidated grant request and is only eligible for a 2-yr grant. See Att. 8 for estimated project costs and service hours.

Other Sources and In-Kind Match

Other Sources*:

N/A

Are you using in-kind match?* No

Other Support

Other Support:

Pierce Transit's source of local match is 0.6% of all sales tax generated in Pierce County. Local match commitment letter is attached to this application (Att. 7). Pierce Transit has not been able to identify other sources of funding for the project at this time. If this request is not fully funded, the agency may try to identify external partners for the project but may also look at prioritizing which services to operate.

Budget Development Methodology

Budget development methodology*:

This application is proposing to fund the Puyallup Runner microtransit zone project with 3.3 vehicles operating 359 days a year (365 days minus six days of holidays) at specified hours (7am to 10pm). Budget methodology is based upon the number of service hours, number of vehicles in service, and the cost per service hour being proposed for this project.

Estimated costs for the Puyallup Runner were calculated using the following variables, which were informed by actual operating data.

Puyallup Runner Budget Factors for 2027-2029 Biennium

*3.3 vehicles in service

*Cost per service hour: \$84.345 per hour

*Number of days per year operating Runner: 359 days per year

*Number of service hours per year: 17,784

*Number of service hours for two years: 17,784 hours per year x 2 years = 35,568 hours

Calculation of Estimated Operating Costs for 2027-2029 Biennium

(35,568 service hours per biennium) x (\$84.345 per service hour) = \$2,999,983 for the two-year period

Total Project Amount: \$2,999,983

Grant Amount (95%): \$2,849,984

Local Match (5%): \$149,999

See Att. 8 for a detailed budget breakdown of estimated project costs and estimated service hours.

Summary

July 1, 2027 - June 30, 2029

Total Expenses:	\$2,999,983.00
Match Total:	\$149,999.00
Requested Amount:	\$2,849,984.00
	This is the amount of grant funds your organization is requesting from July 1, 2027 - June 30, 2029
Percentage of Match:	5.00%

July 1, 2029 - June 30, 2031

Total Expenses:	\$0.00
Match Total:	\$0.00
Requested Amount:	\$0.00
	This is the amount of grant funds your organization is requesting from July 1, 2029 - June 30, 2031
Percentage of Match:	0.00%

Indirect Costs

Indirect Costs

Are you charging indirect costs to this grant/project?: No

Service Level

Project Service Level Information

Project Specific Information	July 1, 2025 - June 30, 2027 (Current Estimate)	July 1, 2027 - June 30, 2029 (Projected)	Percent of Change	July 1, 2029 - June 30, 2031 (Projected)	Percent of Change
Passenger Vehicle Hours	28176	35568	26.24%	0	-100.00%
Passenger Vehicle Miles	184096	529964	187.87%	0	-100.00%
<i>Passenger trips should be entered as whole numbers only.</i>					
Passenger Trips	53994	62688	16.10%	0	-100.00%
Volunteer Hours	0	0	0.00%	0	0.00%

Project Service Level Description

Describe the methodology used to develop these estimates, including any assumptions used in their development. Identify data sources and monitoring processes.

How were service-level estimates developed?*

Service Hours- Microtransit service hours are determined by evaluating when transportation demand is greatest, the mobility needs of the community, connections to other transit services, and the available operating budget. The objective is to provide service during the times when it is most useful to riders while maintaining an efficient and financially sustainable operation.

For the Puyallup Runner, the service span is based on a 15-hour operating day for 359 days per year. Because the service has been operating in the Puyallup zone since November 2023, we have substantial historical ridership data to evaluate actual demand by day and time of day. Via's data portal allows us to analyze trip volumes, pickup and drop-off patterns, peak demand periods, and other utilization metrics.

This historical data is used to identify the hours when riders are most likely to need the service and to project future demand. Service hours can then be adjusted to align with demonstrated demand, major trip-generating destinations, employment and activity patterns, connections to fixed-route transit, and community needs.

The final service span is also evaluated against the available operating budget. This approach ensures that service hours are based on actual community demand and performance data while maintaining a level of service that is operationally and financially sustainable.

For passenger trips and passenger vehicle miles, see Supplemental Information Section.

For demand-response or deviated fixed-route projects, summarize the intended outputs of this project in both qualitative (narrative) and quantitative (statistical) formats. Some projects may not align with traditional performance measures (e.g., revenue vehicle hours/miles, passenger trips). In such cases, quantifiable objectives can be reported instead, such as: the number of trainings conducted, outreach events completed, passengers served, or other measurable outcomes generated by this project. Be sure to include a quantitative output, as this will serve as the baseline measurement for your next biennium application. Qualitative measures are optional.

Intended Outputs:

*Increased and continued uninterrupted operation of the Puyallup Runner

*Average Customer Wait Time: This metric evaluates Runner program relative to other Pierce Transit service. Our goal is a wait time of 25 minutes or less, consistent with most PT bus routes

*Percent of Seats Available/Unavailable Per Day: This metric determines how we meet demand. Our goal is 90-95% seat availability, a microtransit standard indicating service efficiency

*Overall Program Cost: This metric evaluates the long-term viability of the microtransit operation and informs the number of many vehicles to be operated

*Number of Accidents: This metric is our most important measure and is monitored by our contractor and Pierce Transit's Safety and Risk departments

*Number of Complaints: This metric informs us of the overall stability of the program and identifies areas requiring additional time, resources, or investment, allowing the agency to prioritize issues that matter most to customers

How will your organization measure whether the project is successful? Describe the steps you will take to improve performance if your project does not meet the identified performance targets.

Project Success Measurement*:

Pierce Transit retrieves data from Via (microtransit contractor) and incorporates the data into Microsoft PowerBI, which is accessible to all Pierce Transit staff. Runner data can be accessed directly through Via or through PowerBI. Pierce Transit monitors the Runner's service performance daily and any issues identified are promptly discussed with Via. The agency continuously explores opportunities to improve services, and regularly conducts public outreach to gather feedback from riders.

Pierce Transit receives monthly reports from Via that provide updates on fleet vehicles and their preventative maintenance activities, driving behaviors, budget, safety meetings, and customer feedback. These reports help ensure Via's operations align with Pierce Transit's expectations. In addition, weekly meetings with the Via operations team allow Pierce Transit to review any emerging issues, and the agency remains in daily communication when urgent matters requiring more immediate attention arise.

Milestones

Readiness to Proceed

Will your project be ready to proceed at the start of the biennium?: Yes

Milestones

Activities	Date (mm/yy)
Project Start	07/27
Project Complete	06/29

Supplemental Information

Supplemental Information

Supplemental Information:

Continuation of Project Service Level Description- How were service levels developed?

Passenger Trips- Ridership projections are based on actual operating data collected since the Puyallup Runner launched in November 2023 through current ridership levels. This provides a strong historical baseline for evaluating demand, identifying trends, and projecting future utilization.

In June 2025, we also redesigned the Puyallup service zone to better align the service area with demonstrated rider demand and travel patterns. The redesigned zone provides an additional period of data that can be evaluated to determine how changes in the service area affected ridership, trip patterns, and overall service utilization.

By analyzing ridership before and after the June 2025 zone redesign, we are able to distinguish longer-term ridership trends from changes resulting from the updated service area. This historical and post-redesign data provides a more accurate basis for projecting future ridership and determining the appropriate level of microtransit service.

Note that the number of passenger trips for the 2025-2027 biennium is higher than the projected 2027-2029 passenger trips due to the increased travel during the 2026 FIFA World Cup event.

Passenger Vehicle Miles- Via's Service Delivery team assisted Pierce Transit in developing ridership and service estimates associated with transitioning the Puyallup Runner to a first/last-mile service model. These estimates were informed by the existing operating data, historical ridership, and anticipated changes in travel patterns resulting from the new service approach. Passenger Vehicle Miles estimates are based on 2.0 vehicles in operation in FY 2025-2027 and 3.3 vehicles in FY 2027-2029.

Under the first/last-mile model, the Runner provides an important mobility option in areas where fixed-route bus service is not viable or practical. The service will help connect riders to existing bus routes and transit centers, particularly those who may be unable to safely or comfortably walk the distance to a fixed-route stop.

This approach allows the Runner to complement, rather than duplicate, the existing fixed-route network. By focusing microtransit resources on first/last-mile connections and areas where traditional fixed-route service is less practical, the Runner can continue addressing critical transportation gaps while providing riders with a flexible and accessible connection to the broader transit system.

Vulnerable Populations in Overburdened Communities & Tribes

Vulnerable Populations in Overburdened Communities

Identify the type of direct and meaningful benefits your project provides to vulnerable populations using the descriptions above, if applicable. Explain how your project delivers these benefits and the impact it will have on the populations served.

Vulnerable Populations in Overburdened Communities*:

Based on the Washington State Environmental Health Disparities (EHD) Map (ver.3), the Puyallup Runner microtransit zone has census tracts that receive EHD rankings ranging from 5 to 9 (Att. 9).

Within the Puyallup Runner zone are heavily congested transit corridors such as SR-512 and SR-161/Meridian. Vulnerable populations living around these corridors face a heightened risk of exposure to air pollution. Runner's door-to-door service and first- and last- mile connections to bus lines reduce this risk by providing direct transportation for individuals who may otherwise be more exposed to environmental health disparities. Operating during off-peak hours also provides greater flexibility for people traveling to and from work while helping them avoid periods of heavier traffic. By offering service when traditional transit options are limited, Runner improves access to employment and essential services and provides a more affordable transportation option for low-income individuals, helping reduce mobility barriers and expand access to employment and other opportunities that support socioeconomic advancement. Improved access also contributes to greater workforce participation, productivity, and economic growth. Runner provides environmental benefits by grouping passengers traveling along similar routes, which can reduce the number of individual vehicle trips, traffic congestion, and transportation-related emissions. The use of zero-emission or hybrid vehicles further reduce greenhouse gas and other roadway emissions, supporting cleaner and greener transportation and potentially contributing to improved air quality. In addition, Runner complements existing public transit services and strengthens connections for people with accessibility and mobility needs. Improved connections between services help reduce wait and travel times, while providing more efficient transportation options and potentially reducing exposure to traffic-related risks.

If these populations were engaged by you or your representatives in developing or maintaining the project, describe the outreach efforts and results. Include details such as methods used to engage the community, feedback received, and how the input influenced the project's design or implementation.

Inclusive outreach in planning:

Aligning with Pierce Transit's 2024-2029 Strategic Plan Goal 2 to "Engage with the community through outreach, partnerships, and listening opportunities," Pierce Transit implemented a series of targeted strategies to effectively involve and support the communities that Pierce Transit serves. The participation of people is critical to the long-term sustainability of the agency. PT's Strategic Plan is attached. (Att. 10)

Community members are able to provide feedback and suggest improvements and recommendations on plans, policies, and services offered by Pierce Transit to the Pierce Transit Community Transportation Advisory Group (CTAG), an advisory group that provides input to the Board of Commissioners. CTAG provides a forum for interactive discussions that encourages community stakeholder input, creating a two-way conduit to inform and get information out to the public; represent the interests of the community and help guide decisions in meeting priorities.

Tribal Support

Is this project directly operated by a tribe?* No

Is your project serving and is it supported by a tribal nation in Washington?: No

Environmental Justice

Environmental Justice Assessment (EJA)

You must conduct an Environmental Justice Assessment (EJA) if you apply for \$15 million or more in grant funds.

Are you requesting \$15 million or more in WSDOT funds for your proposed project?* No

Attachments

Attachments

Named Attachment	Required	Description	File Name	Type	Size	Upload Date
Required for all projects						
Population density map	✓	Population Density Map 2026	POPULATION DENSITY MAP_2026regionalpriorityranking-piercecomap.pdf	pdf	489 KB	09/03/2026 12:51 PM
Service area map	✓	Pierce Transit Service Area Map	Pierce Transit Service Area Map 3.29.26.pdf	pdf	587 KB	09/03/2026 09:25 AM

Required for new nonprofit applicants only

501(c) IRS Letter of Determination

WA Utilities & Transportation

Commission (UTC) Certification

(required for new nonprofit applicants that are direct service providers)

Conditionally required

Indirect costs documentation - de minimis rate self-certification; negotiated indirect cost rate letter from cognizant agency; or a cost allocation plan

In-kind match valuation proposal (required for operating & mobility management projects that are proposing to use in-kind as matching funds)

Procurement policy (required for new applicants or existing grantees without a current policy on file with WSDOT if this project includes the procurement of services or capital assets)

Correspondence from a tribe in support of your project (if project is serving and supported by tribe(s). Not required if the applicant is a tribe.)

Optional attachments

Letters committing matching funds

Pierce Transit's current Procurement Policy and Procedures. This document is currently on file with WSDOT, however, a copy has been attached to this application for convenience.

[Pierce Transit Procurement Policy and Procedures Rev May 2021.pdf](#) pdf 324 KB 09/03/2026 09:29 AM

Letter of concurrence (for projects that operate in multiple planning regions)

Letter of Commitment for Matching Funds signed by Pierce Transit CFO. This letter is also included in the supplemental information as it is referenced in the narrative as a specific attachment. It is attached here separately.

[h. ATTACHMENT 7. Letter of Match Commitment Puyallup Runner.pdf](#) pdf 231 KB 09/03/2026 09:09 AM

Letters of support (combine into one file attachment)

Letters of support from City of Puyallup, Puyallup Chamber of Commerce, MultiCare Good Samaritan Hospital, and Pierce County Human Services. Uploaded as single PDF

[FY2026 WSDOT Consolidated_PUYALLUP_Letters of Support combined file.pdf](#) pdf 1 MB 09/03/2026 09:05 AM

Supplemental information

Additional supporting documents referenced in narrative: 1) Transportation Gaps Map; 2) Special Transportation Needs Density Map; 3) Puyallup Runner boardings; 4) Fixed route boardings; 5) PSRC Coord. Mobility Plan; 6) Transit Development Plan; 7) Match Commitment; 8) Grant budget; 9) Health disparities map; 10) Pierce Transit Strategic Plan Attached as a single combined PDF file.

[Portfolio1_SUPPORTING MATERIALS_Puyallup Combined file.pdf](#) pdf 27 MB 09/03/2026 09:23 AM

Optional construction attachments

NEPA/SEPA assessment, if available

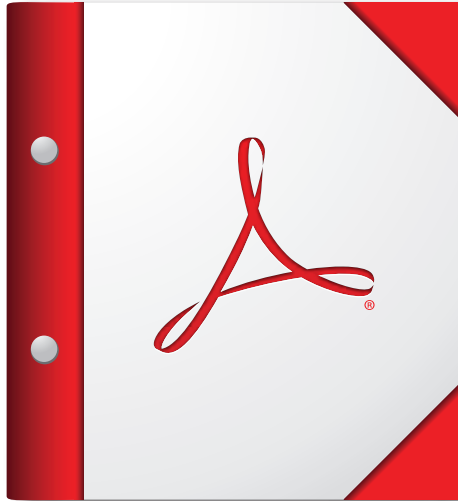
Supplemental construction project information (building or site designs, site plans, location exhibits, etc.), if available

Certification

Certification

I certify, to the best of my knowledge, that the information in this application is true and accurate and that this organization has the necessary fiscal, data collection, and managerial capabilities to implement and manage the project associated with this application:

Certification*:	Yes
Application Authority*:	Erin Hoiland First Name Last Name
Title*:	Grants Administrator
Date*:	09/08/2026



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August 31, 2026

Don Chartock, Director
Public Transportation Division
Washington State Department of Transportation
310 Maple Park Ave. SE
Olympia, WA 98501-7387

Subject: Local Match Commitment for Pierce Transit's 2027–2029 WSDOT Consolidated Grant
Program Application for the Puyallup Runner

Dear Director Chartock:

On behalf of Pierce Transit, I am writing to confirm the agency's commitment to providing the required 5% local match (required match for new projects) for our WSDOT 2027–2029 Consolidated Grant Program application. This application requests funding in the amount of \$2,849,984 over two years (7/1/27-6/30/29) in support of operation of Pierce Transit's Puyallup Runner, special needs connector/microtransit service servicing the City of Puyallup between 2027 and 2029 as set forth in the enclosed application.

Pierce Transit will contribute the required **5% match** of **\$149,999** in local matching funds, bringing the total project budget to \$2,999,983 over the two-year period should this request be funded.

The source of local funds is Pierce Transit's voter-approved levy of 0.6% sales tax collected in Pierce County, Washington. These funds are secure and available upon successful award of this grant.

If you have any questions, please feel free to contact me at cschuler@piercetransit.org. Thank you.

Sincerely,

A handwritten signature in black ink, appearing to read "Chris Schuler", written over a light blue horizontal line.

Christopher Schuler
Chief Financial Officer
Pierce Transit





Letters of Support

The following letters of support are provided with this application:

City of Puyallup
Puyallup Chamber of Commerce
MultiCare Good Samaritan Hospital
Pierce County Human Services

2027-29 WSDOT Consolidated Grant (Operating)

Project: 2027-29 Pierce Transit Consolidated Operating Grant—Runner (Puyallup)

Applicant:
Pierce County Public Transportation Benefit Area Corporation (DBA Pierce Transit)
3701 96th Street SW
Lakewood, WA 98499-4431



CITY OF PUYALLUP

STEVE KIRKELIE
City Manager

August 26, 2026

Michael Griffus
Chief Executive Officer
Pierce Transit
3701 96th St. SW
Lakewood, WA 98499-4431

Re: Letter of Support for Pierce Transit's WSDOT 27-29 Consolidated Grant Program Applications for Puyallup Runner

Dear Mr. Griffus,

On behalf of City of Puyallup, I am writing to express our support for Pierce Transit's Washington State Department of Transportation's Consolidated Grant Program application to fund the Pierce Transit Runner in Puyallup.

Pierce Transit Runner is a micro transit service that currently provides transportation to special needs populations such as the youth, people with disabilities, older adults aged 65 and older, and families with low incomes. Runner is a flexible, on-demand service that riders can utilize by easily booking rides through a smart phone application. Runner connects special needs populations to bus lines, transit centers, and shuttle pick up locations. Runner fills in transportation gaps for ADA paratransit eligible riders by operating in areas within Pierce County that are not served by fixed-route buses or shuttle service zones, providing essential first- and last-mile connections.

The project is also an important equity and opportunity investment to the ADA community and aims to increase ADA accessibility and mobility throughout the Pierce Transit service area.

Thank you for your consideration of Pierce Transit's grant applications to continue funding public transportation for special needs populations in Pierce County. This investment aligns with the Washington State Department of Transportation's commitment to supporting accessible, equitable transportation options that address the mobility needs of people with disabilities, older adults, and other populations who face barriers to transportation throughout Washington State.

Sincerely,

Steve Kinkelie
City Manager



323 North Meridian, Suite A • Puyallup, WA 98371 • Tel: 253.845.6755 • www.puyallupsumnerchamber.com

August 25, 2026

Michael Griffus
Chief Executive Officer
Pierce Transit
3701 96th St. SW
Lakewood, WA 98499-4431

Re: Letter of Support for Pierce Transit's WSDOT 27-29 Consolidated Grant Program
Applications for Puyallup Runner

Dear Mr. Griffus,

On behalf of the Puyallup Sumner Chamber of Commerce, I am writing to express our support for Pierce Transit's Washington State Department of Transportation's Consolidated Grant Program application to fund the Pierce Transit Runner in Puyallup.

Pierce Transit Runner is a micro transit service that currently provides transportation to special needs populations such as the youth, people with disabilities, older adults aged 65 and older, and families with low incomes. Runner is a flexible, on-demand service that riders can utilize by easily booking rides through a smart phone application. Runner connects special needs populations to bus lines, transit centers, and shuttle pick up locations. Runner fills in transportation gaps for ADA paratransit eligible riders by operating in areas within Pierce County that are not served by fixed-route buses or shuttle service zones, providing essential first- and last-mile connections.

The project is also an important equity and opportunity investment to the ADA community and aims to increase ADA accessibility and mobility throughout the Pierce Transit service area. Thank you for your consideration of Pierce Transit's grant applications to continue funding public transportation for special needs populations in Pierce County. This investment aligns with the Washington State Department of Transportation's commitment to supporting accessible, equitable transportation options that address the mobility needs of people with disabilities, older adults, and other populations who face barriers to transportation throughout Washington State. Sincerely,

A handwritten signature in black ink, appearing to read "A Shaffer".

Alison Shaffer
President and CEO



MultiCare Health System

820 A Street, Tacoma, WA 98402

PO Box 5299, Tacoma, WA 98415-0299 ~ multicare.org

August 31, 2026

Michael Griffus
Chief Executive Officer
Pierce Transit
3701 96th St. SW
Lakewood, WA 98499-4431

Re: Letter of Support for Pierce Transit's WSDOT 27-29 Consolidated Grant Program Applications for Puyallup Runner

Dear Mr. Griffus,

On behalf of MultiCare Health System, I am writing to express our support for Pierce Transit's application to the Washington State Department of Transportation's Consolidated Grant Program to fund the Pierce Transit Runner in Puyallup.

MultiCare is a nonprofit health system that serves patients throughout Washington state and across the Pacific Northwest. Reliable transportation is a critical social determinant of health, directly affecting a person's ability to access medical care and other essential services. Without it, patients may miss appointments or experience delays in treatment that worsen health outcomes.

The Pierce Transit Runner is a microtransit service that helps remove transportation barriers for special needs populations in Pierce County, such as youth, people with disabilities, adults 65 and older and families with low incomes. The service includes a stop at MultiCare Good Samaritan Hospital in Puyallup, helping ensure our community members can access the care they need.

Using a smart phone application, riders can easily book flexible on-demand trips. The Runner connects special needs populations to bus lines, transit centers and shuttle pick-up locations. This service also addresses transportation gaps for Americans with Disabilities Act (ADA) paratransit-eligible riders by operating in areas within Pierce County that are not served by fixed-route buses or shuttle service zones, providing essential first- and last-mile connections.

MultiCare strongly supports this project because it's an important investment in equitable, accessible transportation. By expanding mobility and independence for people with disabilities and other vulnerable populations, the Pierce Transit Runner helps strengthen the health and well-being of communities throughout the Pierce Transit service area.

Thank you for considering this grant application. Please let us know if there is additional information or support, we can provide.

Sincerely,

A handwritten signature in blue ink, appearing to read "Dawn J. Anuszkiewicz".

Dawn J. Anuszkiewicz
Good Samaritan Hospital
President and East Pierce Market Leader



August 21, 2026

Michael Griffus
Chief Executive Officer
Pierce Transit
3701 96th St. SW
Lakewood, WA 98499-4431

Re: Letter of Support for Pierce Transit's WSDOT 27-29 Consolidated Grant Program Applications
for New and Existing Runner Services in Pierce County

Dear Mr. Griffus,

On behalf of Pierce County Human Services, I am writing to express our support for Pierce Transit's Washington State Department of Transportation's Consolidated Grant Program applications to sustain Runner service in Spanaway, Gig Harbor, Ruston, and Tideflats, as well as to fund a new microtransit zone in Puyallup.

Pierce Transit Runner is a micro transit service that currently provides transportation to special needs populations such as the youth, people with disabilities, older adults aged 65 and older, and families with low incomes. Runner is a flexible, on-demand service that riders can utilize by easily booking rides through a smart phone application. Runner connects special needs populations to bus lines, transit centers, and shuttle pick up locations. Runner fills in transportation gaps for ADA paratransit eligible riders by operating in areas within Pierce County that are not served by fixed-route buses or shuttle service zones, providing essential first- and last-mile connections.

The project is also an important equity and opportunity investment to the ADA community and aims to increase ADA accessibility and mobility throughout the Pierce Transit service area.

Thank you for your consideration of Pierce Transit's grant applications to continue funding public transportation for special needs populations in Pierce County. This investment aligns with the Washington State Department of Transportation's commitment to supporting accessible, equitable transportation options that address the mobility needs of people with disabilities, older adults, and other populations who face barriers to transportation throughout Washington State.

Sincerely,

Daeveene J. May

Daeveene May
Program Specialist 3- Transportation

Route Types

Frequent

Trunk routes run earlier, later and more often along major streets.

Standard

Routes connect urban and suburban areas to transit centers, typically every 30-60 minutes (see schedules).

Express

Faster and more direct AM/PM service connects major destinations with fewer intermediate stops.

Seasonal

Local service only operates for a few months every year.

Stream

Stream Community Line has frequent AM/PM rides and fewer stops.

PierceTransit SYSTEM MAP

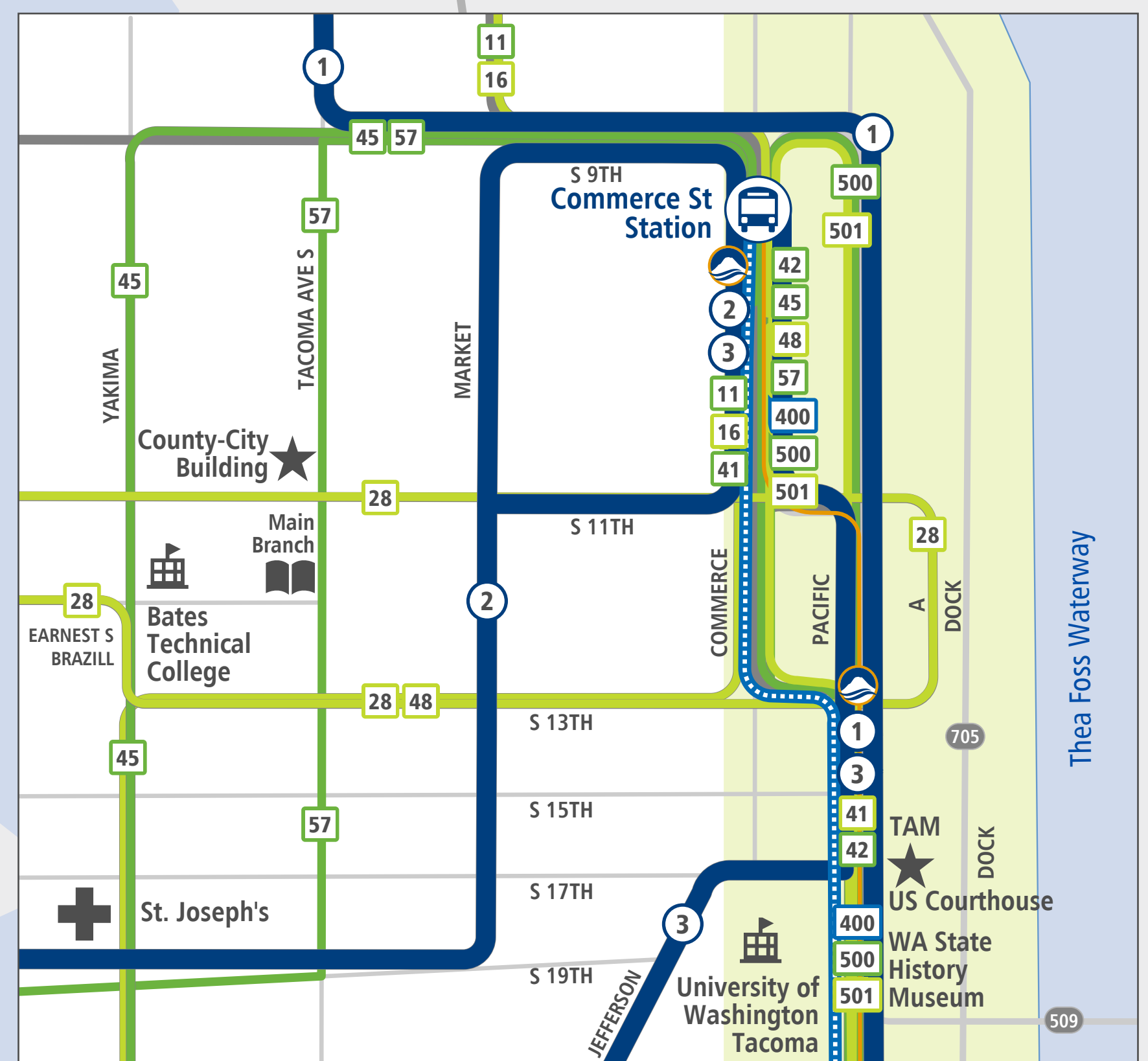
Map Icons

- Transit Center
- Park & Ride
- Sounder Train Station
- Ferry
- Government
- School
- Library
- Hospital

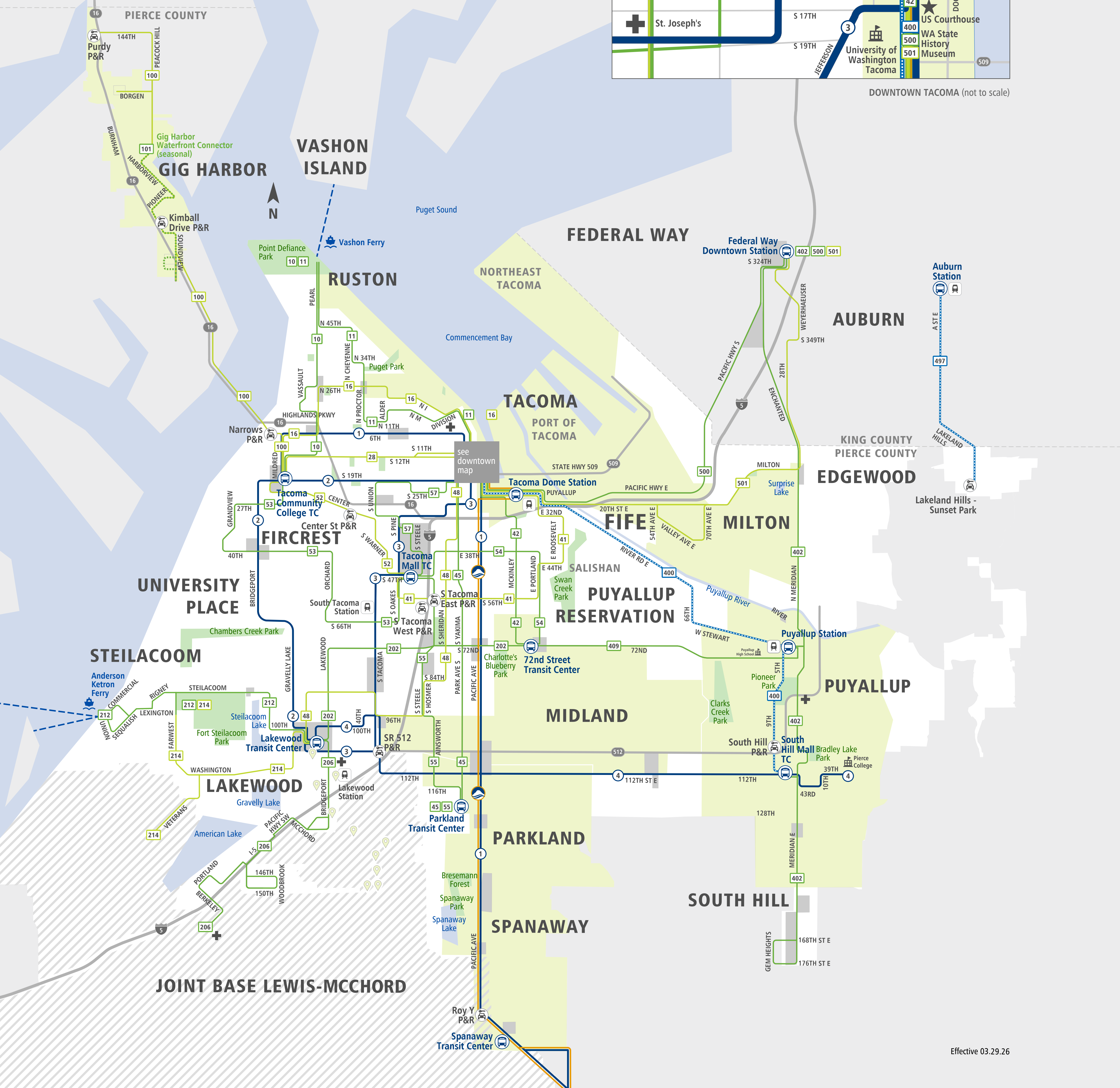
Map Areas

- Pierce Transit Service Area
- Joint Base Lewis-McChord
- Shopping Center
- Park
- Water Body
- Pierce Transit Runner Zone (JBLM Runner Pick Up)

Ready to plan your trip? Visit: TripPlanner.PierceTransit.org



DOWNTOWN TACOMA (not to scale)



PIERCE TRANSIT PURCHASING PROCEDURES MANUAL

Published May 2021

Purpose

Pierce Transit's Purchasing Procedures Manual ("Manual") is intended to direct the procurement of goods and services at a reasonable cost, using an open, fair, documented and competitive process whenever reasonable and possible. The integrity, efficiency, and effectiveness of Pierce Transit's procurement functions are critical elements of sound government.

Policy Statement

The Pierce Transit Board of Commissioners ("Board") has set forth the agency's policy requirements and the delegation of certain authority for the purchase of goods and services in the Pierce Transit Code ("Code"). All provisions in this Manual are subject to the Code, and in the event of any conflict between this Manual and the Code, the provisions of the Code shall govern. The Code is kept on file with the Clerk of the Board and may be found here: https://library.municode.com/wa/pierce_transit/codes/code?nodeId=PIERCE_TRANSIT_WASHINGTONCO

Pierce Transit desires a fair and open process for procurement of goods and services that is free from the potential for bias and conflict of interest. Pierce Transit also strives to apply consistent and appropriate practices for solicitations and contracting. Procurements of goods and services shall provide Pierce Transit with the best quality and best value. All purchases are to be made within budgetary limitations and for the purpose of the goals and objectives approved in Pierce Transit's budget.

In the Code, the Board has delegated the CEO the responsibility to develop and administer procurement procedures. Inherent in that delegation is the responsibility to procure goods and services that are of high quality and that perform their intended purpose, and to use good judgment during the procurement process. The Finance Division, and specifically the Procurement Department, is charged with developing the administrative procedures to implement the Code. Procedures ensure the fiscal responsibility of Pierce Transit in expending resources for goods and services for operations. This Manual is based on legal requirements and guidelines provided in the Revised Code of Washington, by the State Auditor's Office, and by best practices developed by the Municipal Research Services Center and Government Finance Officers Association, among other resources.

This Manual governs the purchase of supplies, materials, inventoried maintenance parts and equipment, personal purchased and professional services, and public works contracts. In order to ensure a fair and open procurement process, Pierce Transit employs Procedures and Guidelines for Preventing Organizational Conflicts of Interest (OCOI) attached hereto as Exhibit B.

Definitions

- A. "Architectural and Engineering Services" means Professional Services rendered by any person, other than a Pierce Transit employee, to perform activities within the scope of the professional practice of architecture (Chapter 18.08 RCW), professional practice of engineering and land surveying (Chapter 18.43 RCW), and/or professional practice of landscape architecture

(Chapter 18.96 RCW).

- B. "Committee" means any committee created by the Board of Commissioners that has been delegated authority by the Board to authorize contracts up to a certain value. As of the date of this Manual, both the Executive Finance Committee and the Service Delivery and Capital Committee have been granted authority by the Board to approve contracts valued at up to \$1,000,000.
- C. "Contract Authorization Summary" outlines the levels at which the CEO, Executive Directors, managers, or the Board may commit Pierce Transit to a contract. This summary is attached as Exhibit A.
- D. "Electronic Signature" means an electronic sound, symbol, or process attached to or logically associated with a contract or other record and executed or adopted by a person with the intent to sign the record.
- E. "Electronic Record" means information that is inscribed on a tangible medium or that is stored in an electronic or other medium and is retrievable in perceivable form.
- F. "Emergency" means unforeseen circumstances beyond the control of Pierce Transit that either (a) present a real, immediate threat to the proper performance of essential functions; or (b) will likely result in material loss or damage to property, bodily injury, or loss of life if immediate action is not taken.
- G. "Formal Competitive Bid" is the process of advertising and receiving sealed written or sealed electronic bids from prospective vendors. The selection of the vendor is primarily based on the lowest cost from a responsible vendor.
- H. "Informal Competitive Quotes" are price quotes from vendors that are obtained in a variety of ways such as phone, fax, electronically, website comparisons, or writing. Results must be documented. The selection of the vendor is primarily based on the lowest cost from a responsible vendor.
- I. "Interlocal Agreements" are agreements relating to the exercise of governmental powers in a joint or cooperative undertaking with another public agency pursuant to RCW 39.34.
- J. "Invitation To Bid" is a process to solicit competitive bids for public works contracts. This includes the specifications, engineer's cost estimate, and construction drawings.
- K. "Life Cycle Cost" means the total cost of an item to Pierce Transit over its estimated useful life, including costs of selection, acquisition, operation, maintenance, and where applicable, disposal, as far as these costs can reasonably be determined, minus the salvage value at the end of its estimated useful life.
- L. "Materials, Supplies and Equipment" are tangible personal property items that are purchased not in connection with a Public Work project. These items may be either operating or capital, depending on the nature of the purchase and intended use. Examples include vehicle parts, office supplies, landscape materials and the like.
- M. "MRSC Small Works, Vendor and Consultant Roster" is a shared statewide small public works, vendor and consultant roster service managed by the Municipal Research and Services Center of Washington (MRSC) used by Washington state local public agencies. The Small Works, Vendor and Consultant Roster is maintained and operated in full compliance with state laws and purchasing requirements.

- N. "Ordinary Maintenance" is work performed by Pierce Transit staff. Ordinary Maintenance is not Public Work. This term does not include maintenance work performed by contract.
- O. "Prevailing Wage" is defined as the hourly wage, usual benefits and overtime, paid in the largest city in each county, to the majority of workers, laborers, and mechanics. Prevailing wages are established by the Department of Labor and Industries, for each trade and occupation employed in the performance of public work. They are established separately for each county and are reflective of local wage conditions.
- P. "Personal Services" are services provided by consultants that provide highly specialized, generally one-time expertise to solve a problem or render professional opinions, judgments or recommendations. The labor and skill involved to perform these types of services are predominately mental or intellectual, rather than physical or manual. Examples include graphics design, advertising, analysis, financial expertise, accounting, artists, attorneys, bond brokers, computer consultants, insurance brokers, economists, planners, real estate services, etc. This term does not include Architectural and Engineering Services Professional Services) or Purchased Services.
- Q. "Professional Services" are as defined in A. "Architectural and Engineering Services."
- R. "Purchased Services" are services provided by a vendor to accomplish routine, continuing and necessary functions to support the day to day operations of Pierce Transit. This includes services for equipment maintenance and repair, operation of a physical plant, landscaping, janitorial, computer hardware and software maintenance, security monitoring, fire system monitoring, and scheduled system repairs such as HVAC, etc. Prevailing wage requirements may apply based on the type of service performed.
- S. "Purchase" is a transaction to acquire a good or service in exchange for money. In this Manual, Purchase refers to a single transaction or contract.
- T. "Purchaser" is the individual Pierce Transit employee seeking to procure goods and services and the person who will be responsible for the oversight of the services received.
- U. "Public Work" as defined in RCW 39.04.010, means all work, construction, alteration, repair or improvement other than Ordinary Maintenance, executed at the cost of Pierce Transit or which is by law a lien or charge on any Pierce Transit property. Public work projects include the related materials, supplies and equipment to complete the project.
- V. "Request for Proposals (RFP)" means a process to procure Personal and Purchased Services that requests interested firms to submit a proposal for completing a specific scope of work. The proposal may include qualifications and cost. Proposals are then evaluated based on the idea, including originality, suitability, practicality, expertise, etc. Proposals may be selected based on the quality of the proposal, experience, cost and references, among other criteria.
- W. "Request for Qualifications (RFQ)" is used to procure Professional Services, and means a process that requests interested consultants to submit a letter of interest and a statement of their qualifications. Consultants are evaluated upon their qualifications, expertise, and references. Cost cannot be a consideration until after a consultant has been selected at which point the price may be negotiated.
- X. "Small Works Roster" is a roster of qualified contractors maintained for use in a modified

formal bid process. When the contract amount for a public works project is within the limits set forth by RCW 39.04.155, Pierce Transit may follow the small works roster process for construction of a public work or improvement as an alternative to formal competitive bid requirements.

- Y. "Sole Source" occurs when competition among potential vendors is not possible or feasible for a procurement. Typically, this occurs when there is clearly and legitimately only one source capable of supplying the subject matter or circumstances exist where specialized knowledge or skill is needed and there is limited time and vendors with the necessary expertise. Procurements of items for which Pierce Transit has established a standard by designating a brand or manufacturer or by pre-approving via testing are considered Sole Source if there is only one vendor of the item.
- Z. "Unit Priced Contract" means a competitively bid contract in which public works are anticipated on a recurring basis to meet the business or operational needs of Pierce Transit, under which the contractor agrees to a fixed period indefinite quantity delivery of work, at a defined unit price for each category of work. As services are to be rendered, specific work orders are initiated that are to be completed by the contracting firm.
- AA. "Vendor List" means the process to award contracts for the purchase of any materials, equipment, supplies or services in lieu of formal sealed bidding pursuant to RCW 39.04.190.
- BB. "Original Equipment Manufacturer (OEM)" refers to parts that are manufactured by the original manufacturer or for them to their exact specifications by an external company. There may be some instances where OEM parts are required for repair and maintenance to preserve an active warranty and or the proper function of the vehicle, equipment or facility being repaired. OEM parts are typically only available for purchase from the original manufacturer and occasionally available through authorized dealers. When purchasing from an authorized dealer/distributor, the prices are usually regulated therefore competitive quotes or bids are typically not feasible.
- CC. "EAM/Trapeze" is the software system used by the Maintenance Department to track repairs of Pierce Transit's vehicles, equipment and facilities. This system is also used to manage purchases and inventory of parts, tools and supplies needed for repairs. EAM/Trapeze is independent from the financial management software used for purchase requests and purchase orders the rest of the agency uses, therefore, the Warehouse Department has a separate process for purchase approvals.
- DD. "Inventoried Maintenance Parts" encompasses all parts purchased through the Warehouse Department for the repair and maintenance of Pierce Transit's vehicles, equipment and facilities. These parts are maintained in inventory and managed by the Warehouse staff.
- EE. "System Generated Replenishment" are the purchases suggested by the Trapeze software program when the daily replenishment function is conducted. The suggested purchases are reviewed by Warehouse staff before being converted to purchase orders and submitted to the appropriate vendor.

Contracting/Delegated Authorities

The Contract Authorization Summary attached as Exhibit A sets forth the levels of authority for purchasing that have been delegated to Committee or the CEO, or to other staff levels by the CEO as permitted by Code Section 3.13.010 (C). If an employee has not been granted contracting authority by the Board as set forth in the Contract Authorization Summary, that employee may not sign an agreement binding or committing the Agency to purchase goods or services. Employees with questions about their authority to sign an agreement on behalf of the Agency should inquire of their Executive Director.

General Provisions Applicable to All Purchases

- A. **Disadvantaged Business Enterprise Program.** Pierce Transit receives financial assistance from the U.S. Department of Transportation (USDOT). As a condition of receiving this assistance, Pierce Transit has established a Disadvantaged Business Enterprise (DBE) Program and has signed an assurance to comply with the DBE regulations found in 49 CFR Part 26. The primary objective of the DBE Program is to ensure non-discrimination in the award and administration of USDOT-assisted Contracts and to create a level playing field in which DBE businesses can compete fairly. Pierce Transit's DBE Program can be found on the Pierce Transit website: <https://www.piercetransit.org/dbe/>
- B. **Ethics.** In fulfilling our fiduciary responsibility to maintain the highest ethics in our purchasing practices, Pierce Transit has adopted a Code of Ethics Policy for all employees and elected Commissioners. The Code of Ethics is detailed in the Code Chapter 1.12, which is incorporated into this Manual by reference herein, and may be accessed at:
https://library.municode.com/wa/pierce_transit/codes/code?nodeId=PT1AD_CH1.12COET
- C. **Grant-funded projects.** Grant funded projects may have additional regulations required for expending federal and state funding. When a procurement involves the expenditure of federal or state grant or contract funds, and the method of procurement required by such agency differs from the requirements of the Code or this Manual, the procurement shall be conducted in accordance with any mandatory applicable federal or state laws and regulations. Project Managers and other staff involved with approving project expenditures must be familiar with all applicable regulations prior to authorizing expenditures.
- D. **MRSC Rosters.** It shall be the responsibility of the Procurement Manager to ensure MRSC rosters and Vendor Lists are maintained, paid for and advertised as may be required by state law.
- E. **Breaking Down or Splitting Purchases, Contracts or Change Orders.** The breaking down, or splitting, of any purchase, contract or change order into units or phases for the purpose of avoiding the requirements of this policy or the maximum delegated dollar approval threshold as set forth in the Contract Authorization Summary is prohibited.
- F. **Purchases on Contracts.** Many purchases are made using a contract. A purchase order should be created for each contract. Each subsequent purchase or payment made on the contract should use the original purchase order number and "pay down" the remaining purchase order balance.

G. **Exceptions to Purchasing Limitations.** Pierce Transit staff may make open market purchases without obtaining the regularly required competitive quotes or bids under any of the following conditions:

1. Special Market Conditions. When supplies or used equipment is offered at a very favorable price and will be sold before Pierce Transit will have a chance to complete the bidding process, it is possible to procure obvious bargains through the procurement of surplus or distress material, supplies or equipment without following bidding procedures.
2. Auctions. Pierce Transit may acquire supplies, materials, and equipment through an auction conducted by the United States or any agency thereof, an agency of the state of Washington, a municipality or other government agency, or any private party, without quotations or bids, if the items to be purchased can be obtained at a competitive price.
3. Interlocal Joint Purchasing Agreements. Materials, supplies, equipment, and services may be purchased under the Interlocal Cooperation Act at RCW 39.34 using joint purchasing agreements with another public agency where there is an assignment of existing contract rights to purchase supplies, equipment or services as originally advertised, competed, evaluated and awarded and the public agency(ies) that awarded the bid, proposal, or contract complied with its own statutory requirements and either: posted the bid or solicitation notice on a web site established and maintained by a public agency, purchasing cooperative, or similar service provider, for purposes of posting public notice of bid or proposal solicitations; or provided an access link on the state's web portal to the notice.
4. Sole Source Procurement. A contract for the purchase of materials, supplies, services, or equipment not exceeding \$100,000 may be awarded without complying with the bidding requirements of this Manual when the Executive Director of Finance makes a written determination that only one vendor is able to meet the needs of Pierce Transit. Note: renewal of annual software license and support fees do not require a sole source justification. Any Sole Source contract valued at over \$100,000 requires Board approval. All Sole Source awards exceeding \$10,000 are reported to the Board at least quarterly.
5. No Bids or Quotations Received. When no bids or quotations are received in response to an invitation to bid the Procurement Manager or his/her designee is authorized to procure the required item through direct negotiations with a contractor or to rebid as deemed appropriate.
6. Emergency Procurements. Notwithstanding any other provisions of this Manual, the CEO may make or authorize others to make emergency procurements of materials, supplies, equipment, services or Public Work without complying with competitive procurement requirements in the event of an Emergency provided, that such procurements are made with such competition as is practicable under the circumstances. The CEO's finding of the existence of an Emergency and documentation of the basis for the Emergency and for the selection of the particular contractor shall be included in the contract file. As soon as practicable, a record of each emergency procurement shall be made and shall set forth the contractor's name, the amount and type of the contract, and listing of the item(s) procured under the contract.

All emergency procurements shall be reported to the Board at the next subsequent meeting for ratification. Pierce Transit must produce a contract for each emergency purchase within fourteen (14) days of procurement or the work being performed.

7. Purchase of insurance and bonds.
8. Warehouse Original Equipment Manufacturer (OEM) Inventoried Maintenance Parts. Some Inventoried Maintenance Parts must be OEM and therefore it is not acceptable to purchase “equal” substitutes. It may be required to use OEM parts during a warranty period to maintain the warranty. Additionally, some inventoried maintenance parts are a major or minor sub-component and must be compatible with the existing major components that meet specific manufacturer requirements. In some instances, these parts are only available from the OEM, or there may only be limited number of authorized dealers/distributors of the OEM part.
9. Warehouse staff may use the system generated replenishment feature in the EAM/Trapeze Software System to determine fair and reasonable pricing for the purchase of inventoried maintenance parts. EAM/Trapeze will compare pricing of the previously purchased same and like items and Warehouse staff will issue a Purchase Order based on data not older than twelve (12) months.

Purchase of Materials, Supplies or Equipment

Purchasing Limitations. As set forth below, limitations apply to the cost of individual items or the sum of similar items in a Purchase to fulfill a specific business need, which are not part of a public works project as defined by RCW 39.04.010 and this Manual. Cost is inclusive of sales tax, delivery charges and any related miscellaneous charges. Limits and processes identified in the Contract Authorization Summary shall also be followed when authorizing the acquisition of materials, supplies or equipment. (Warehouse inventoried maintenance parts may have different thresholds as detailed in Exhibit A.)

- A. **Quotes.** Whenever possible, quotes will be solicited on a lump sum or fixed unit price basis. At the time quotes are solicited, the Pierce Transit representative shall not inform a vendor of any other vendor's quote. A written record shall be made by the Purchaser of each vendor's quote on the materials, supplies, or equipment, and of any conditions imposed on the quote by such vendor. All the quotes shall be collected and presented at the same time to the appropriate designee as appropriate for consideration, determination of the lowest responsible vendor and award of purchase.

When there is a reason to believe that the lowest acceptable quote is not the best price obtainable, all quotes may be rejected, and Pierce Transit may obtain new quotes. Warehouse staff may purchase from a quote for a period of twelve (12) months if the vendor agrees to honor the quoted price.

1. No Quotes Required. Purchases not exceeding \$10,000 do not require quotes. However, the Purchaser must provide to Procurement in writing a “fair and reasonable price” determination.
2. Informal Competitive Quotes (verbal). Purchases over \$10,000 and up to \$20,000 require at least three verbal quotes which number may be reduced if the item being sought is only available from a smaller number of vendors. When fewer than three quotes are

requested or if there are fewer than three replies, an explanation shall be placed in the procurement file. The quotes must be documented.

3. Informal Competitive Quotes (written). Purchases over \$20,000 and up to \$35,000 require at least three written quotes. The number of vendors contacted may be reduced if the item being sought is only available from a smaller number of vendors. When fewer than three quotes are requested or if there are fewer than three replies, an explanation shall be placed in the procurement file.

B. **Formal Competitive Bid** - purchases over \$35,000 require the following process:

1. Invitation for Bids. An invitation for bids shall be issued which shall include the specifications and the contractual terms and conditions applicable to the purchase.
2. Award. The award of bid shall be made to the lowest responsible bidder whose bid meets the specifications and evaluation criteria set forth in the invitation for bids. Pierce Transit may reject all bids at its discretion.
3. Lowest Responsible Vendor. The following factors, in addition to price, may be used by Pierce Transit in determining the lowest responsible vendor:
 - a. Any preferences provided by law to local products and vendors;
 - b. The ability, capacity, and skill of the vendor to perform the contract;
 - c. The character, integrity, reputation, judgment, experience, and efficiency of the vendor;
 - d. Whether the vendor can perform the contract within the time specified;
 - e. The quality of performance of previous contracts or services;
 - f. The previous and existing compliance by the vendor with laws relating to the contract;
 - g. Such other information as may be secured having a bearing on the decision to award the contract.
 - h. Life Cycle Costing. In considering the purchase of materials, equipment, supplies, whenever there is a reason to believe that applying the "life cycle costing" method of quote evaluation would result in the lowest total cost to Pierce Transit, first consideration shall be given to purchases with the lowest Life Cycle Cost which complies with the specifications.
 - i. No evaluation criteria may be weighted higher than cost.

- C. **Petty Cash Purchases.** Purchases under \$25 may in some instances be handled through the "Petty Cash" method. Petty cash may be obtained from the Accounting department for purchases of less than \$25 upon completion of a petty cash voucher and submittal of receipt after purchase. Alternatively, an employee may purchase the desired goods and obtain reimbursement from the Accounting Department. A receipt must be attached to the petty cash voucher before reimbursement can be made to the employee. All petty cash requests must be approved by the respective department manager. Advances are reconciled within two (2) business days.

D. Purchase Requisition Authority.

1. Executive Directors may delegate purchasing authority for Cost Centers under their supervision per the following levels:
 - a. User: Up to \$3,500.
 - b. Level 1: Up to \$10,000 (Up to \$20,000 if no approver designated in Level 2, and \$35,000 if no approvers designated in Levels 2 and 3).
 - c. Level 2: Up to \$20,000 (Up to \$35,000 if no approver designated in Level 3).
 - d. Level 3: Up to \$35,000.
2. Executive Directors may approve requisitions up to \$75,000.

The Executive Director of Finance may approve requisitions up to \$200,000

E. Purchase Authority for Warehouse Staff

1. Executive Director of Maintenance may delegate purchasing authority for Cost Centers under their supervision per the following levels:
 - a. Warehouse staff up to \$35,000 per total Purchase Order
 - b. Warehouse staff up to \$75,000 per total Purchase Order for fuel purchases
2. Executive Director of Maintenance may approve requisitions from \$35,000 to \$75,000
3. Executive Director of Finance may approve requisitions from \$75,000 to \$200,000

Public Work

Purchasing Limitations. All Public Works shall be administered by the Procurement Department. Procedures for any Public Work or improvement shall be governed by RCW 39.04. Cost for a public works project includes all amounts paid for materials, supplies, equipment, and labor on the construction of that project, which is inclusive of sales tax, unless exempted by law.

- A. **Cost Estimate.** A cost estimate is required prior to soliciting bids for all Public Work projects. The estimate shall show in detail the estimated cost of the work; the estimated quantities of each class of work; the estimated unit cost for each class; the estimated total cost for each class; the time limit allowed for the completion of the work and the estimated dates of commencement and completion. For federally funded purchases, an independent cost estimate is required prior to receiving bids or proposals in accordance with the requirements of FAR Part 31. The word “independent” does not imply that it is performed by someone other than Pierce Transit staff.
- B. **Instances When No Bids Required.** Public Work with a cost of less than \$40,000 may be procured without advertising and a competitive bid process. Public Work costing \$20,000 or less may be procured with one or more quotes. For Public Work costing \$20,001 to \$40,000, a basic scope of work must be supplied to at least three prospective contractors and written quotes must be obtained. Immediately after the award is made, the bids obtained shall be recorded and open to public inspection and shall be available by telephone or electronic request. All other public work requirements shall be followed.

- C. **Formal Competitive Bid.** For public work projects costing more than \$40,000 and not using any of the authorized bidding exceptions noted in this Public Work section, the formal competitive bid process, as defined by applicable RCWs, shall be used.
1. **Determining Lowest Responsible Bidder.** Pierce Transit shall award the contract for the public works project to the lowest responsible and qualified bidder. However, all bids may be rejected, and Pierce Transit may call for new bids.
 2. **Cancellation of Invitations for Bids.** An invitation for bids may be canceled at the discretion of the Executive Director of the sponsoring department. The reasons for cancellation shall be made part of the contract file. Notice of cancellation shall be sent to all parties that have been provided with a copy of the invitation. The notice shall identify the invitation for bids and state briefly the reasons for cancellation.
 3. **Alternative Public Work Procurements.** Pierce Transit may utilize other public work procurement processes as authorized by the legislature, such as Unit Priced Contracts, Design-Build, General Contractor/Construction Manager and Job Order Contracting.
 4. **Bid Guarantee.** For public works contracts exceeding \$50,000, a bidder will be required to provide with the bid a bid deposit in the form of a surety bond, postal money order, cashier's check, or certified check in an amount equal to five percent of the total bid including sales tax.
 5. **Payment and Performance Bonds.** A payment bond and a performance bond both equal to 100% of the contract total, including sales tax, shall be required for Public Work, except that for Public Work contracts costing \$150,000 or less per RCW 39.08.010, a contractor may choose to have 10% of the contract retained for a period of 30 days after date of final acceptance in lieu of providing the bonds.
 6. **Retainage.** Pierce Transit requires contract retainage not to exceed five percent of the moneys earned by the contractor as a trust fund for the protection and payment of: (i) The claims of any person arising under the contract; and (ii) the state with respect to taxes, increases, and penalties imposed pursuant to Titles 50, 51, and 82 RCW which may be due from such contractor. For any project funded in whole or in part by federal funds, Pierce Transit will rely upon the Payment and Performance Bonds as referred to in chapter 39.08 RCW for the protection and payment of: (i) The claims of any person or persons arising under the contract to the extent such claims are provided for in RCW 39.08.010; and (ii) the state with respect to taxes, increases, and penalties incurred on the public improvement project under Titles 50, 51, and 82 RCW which may be due. The contract bond must remain in full force and effect until, at a minimum, all claims filed in compliance with chapter 39.08 RCW are resolved.
 7. **Non-Collusion Affidavit.** By signing the Bid Form, the Contractor is certifying that the bid is a genuine bid, and that he/she has not colluded with any other bidder or any other person.
 8. **Public Notice.** For formal competitively bid procurements, public notice of the invitation for bids shall be published at least once in a newspaper of general circulation within the Pierce Transit service area boundary, not less than 13 calendar days prior to the date set forth therein for the opening of bids. The public notice shall state the date

and time of bid opening. Bids not received by the date and time stated for bid opening will not be accepted or considered.

9. Bid Opening. Bids shall be opened publicly and recorded at the time and place designated in the invitation for bids. This may include an electronic public opening through e-Builder.
 10. Withdrawal of Bids - Cancellation of Awards. Bids may be modified, or the bid may be withdrawn by written notice received in the office designated in the invitation for bids prior to the time set for opening. After bid opening, withdrawal of bids shall be permitted only to the extent that the bidder can show by clear and convincing evidence presented in a sworn affidavit or declaration submitted no later than 5:00 p.m. on the first business day after bid opening, that a clerical mistake was made and not a mistake in judgment, and the bid price actually intended is higher than the bid listed. All decisions to permit the withdrawal of bids after bid opening, or to cancel awards or contracts based on bid mistakes, shall be made by the Procurement Manager after consulting with legal counsel and other staff as appropriate. A low bidder on a public works project who claims error and fails to enter into a contract is prohibited from bidding on the same project if a second or subsequent call for bids is made for the project.
 11. Tie Bids. When identical bids are received and absent collusion among the vendors, the following procedure will be used to identify the successful vendor.
 - a. All bidders participating in the solicitation shall be invited to the Pierce Transit Headquarters at a time and date specified to determine the successful vendor.
 - b. The names of the vendors submitting identical bids shall be placed in a receptacle suitable for drawing lots.
 - c. A Pierce Transit employee who is agreeable to all parties shall draw from the receptacle one lot and publicly announce the identity of the successful vendor.
 - d. The successful vendor shall be awarded a contract in accordance with the Agency's contracting procedure.
- D. **Limited Public Works.** The Limited Public Works Process may be used for projects with a cost estimate less than \$50,000 as provided under RCW 39.04.155, as amended. For limited public works projects, Pierce Transit will solicit electronic or written quotations from a minimum of three contractors from the appropriate small works roster and shall award the contract to the lowest responsible bidder as defined under RCW 39.04.010. Pierce Transit will equitably distribute opportunities for limited public works projects among contractors willing to perform in the geographic area of the work and will maintain a list of the contractors contacted and the contracts awarded during the previous twenty-four months under the limited public works process, including the name of the contractor, the contractor's registration number, the amount of the contract, a brief description of the type of work performed, and the date the contract was awarded.
- E. **Small Works Roster.** Pierce Transit may utilize a small works roster contract award process for accomplishment of public works projects with an estimated value threshold as provided under RCW 39.04.155, as may be amended from time to time. The limit as of

August 2019 is \$350,000.

1. Roster List. Pierce Transit may contract with MRSC annually to establish, maintain and manage a current roster of eligible contractors from which Pierce Transit may solicit bids for work on Small Public Work Projects.
2. Process. Whenever public work is procured using a small works roster, the Procurement Manager, or delegate, shall obtain telephone, written or electronic quotations from contractors on the appropriate small works roster to assure that a competitive price is established and to award contracts to the lowest responsible bidder as follows:
 - a. A contract awarded from a small works roster need not be advertised. Invitations for quotations shall include an estimate of the scope and nature of the work to be performed as well as materials and equipment to be furnished. However, detailed plans and specifications need not be included in the invitation. This paragraph does not eliminate other requirements for architectural or engineering approvals as to quality and compliance with building codes.
 - b. Quotations shall be invited from all contractors in the appropriate category of the small works roster. As an alternative, quotations may be invited from at least five contractors on the appropriate small works roster who have indicated the capability of performing the kind of work being contracted, in a manner that will equitably distribute the opportunity among the contractors on the appropriate roster.
 - c. If the estimated cost of the work is \$250,000 or more but less than or equal to the dollar threshold for small works projects as provided under RCW 39.04.155, as amended, Pierce Transit may choose to solicit bids from less than all the appropriate contractors on the appropriate small works roster but must also notify the remaining contractors on the appropriate small works roster that quotations on the work are being sought. Pierce Transit has the sole option of determining whether this notice to the remaining contractors is made by:
 - i. Publishing notice in a legal newspaper in general circulation in the area where the work is to be done;
 - ii. Mailing a notice to these contractors; or
 - iii. Sending a notice to these contractors by facsimile or other electronic means.
3. Equitable Distribution. For purposes of this policy, "equitably distribute" means that Pierce Transit may not favor certain contractors on the appropriate small works roster over other contractors on the appropriate small works roster who perform similar services. Generally, Pierce Transit will do this by sending the bid notice to all contractors within the applicable SWR category. Additionally, at the time bids are solicited, Pierce Transit representatives shall not inform a contractor of the terms or amount of any other contractor's bid for the same project.
4. Record of bid, copies of bids received. A written record shall be made by the project manager of each contractor's bid on the project and of any conditions imposed on the bid. Within two days of the big opening, Pierce Transit must provide, if requested by

a bidder, copies of the bids received.

5. Annual listing of contracts awarded. At least once every year, the Procurement Manager or his/her designee shall provide a list of the contracts awarded under the small works roster process to the Pierce Transit Board and to the general public. The list shall contain the name of the contractor or vendor awarded the contract, the amount of the contract, a brief description of the type of work performed or items purchased under the contract, and the date it was awarded. The list shall also state the location where the bid quotations for these contracts are available for public inspection.

F. **Amendments and Change Orders for Public Work.** Where Public Work contracts have been awarded and under which the work is in progress, and individual changes in plans and/or specifications are necessary to properly accomplish the work, the following individuals are authorized to execute individual change orders to the contract under the following conditions:

1. Project Manager, provided that:
 - a. The individual change order does not exceed \$10,000, and
 - b. The revised total of the contract is within the approved contract budget.
2. Executive Director, provided that:
 - a. The individual change order does not exceed \$40,000, and
 - b. The revised total of the contract is within the approved contract budget.
3. Executive Director of Finance, provided that:
 - a. The individual change order does not exceed \$75,000, and
 - b. The revised total of the contract is within the approved contract budget.
4. CEO may approve change orders in any amount, up to his/her purchasing authority, so long as the cumulative change order amount does not exceed the current Board authorized project contingency.

In all other cases, a change order requires the Board of Commissioners or delegated committee approval.

Contracted Services

Purchasing Limitations. Purchase limitations and signing authority as set forth in the Code apply to the entire cost related to the acquisition of services during the term of the contractual obligation, including optional extensions, if any. Cost is inclusive of any required sales tax and related expenses.

- A. **Interlocal Agreements.** Interlocal Agreements require Board approval; annual renewal or extension of existing Interlocal Agreements may be signed and authorized by the CEO provided that the renewal or extension term was within the scope of the Board's initial approval of the Agreement.
- B. **Architectural and Engineering (Professional) Services Contracts.** Procedures set forth in Chapter 39.80 RCW shall be followed for procurement of Professional Services, as defined in RCW 39.80.020. A contract is required to purchase such services.

1. Roster. Pierce Transit may contract with MRSC to establish, maintain and manage a current roster of eligible Architectural and Engineering consultants from which Pierce Transit may solicit bids for contract for providing these services.
2. Contracts \$35,000 or Less. Contracts that have an estimated cost of \$35,000 or less may be procured using an informal request for qualification process. This process requires a Pierce Transit representative to develop a written scope of the project and any criteria used to select the service provider and then select a qualified contractor from the roster. If the Pierce Transit representative does not choose to use the roster, then a formal request for qualification process must be followed.
3. Contracts Greater than \$35,000. Contracts that have an estimated cost greater than \$35,000 must use a formal request for qualification (RFQ) process. The development of an RFQ along with the proper public notification shall be made in accordance with procedures adopted by the procurement department in the best interest of Pierce Transit.
4. On Call Architectural and Engineering Services. In lieu of using the designated roster or a formal procurement process for Architectural and Engineering Services, an on-call firm may be procured using a formal RFQ process and subsequently utilized through an established on-call process.

C. Personal and Purchased Services

1. Contract Required. A contract is required to purchase Personal and Purchased services.
2. Contracts less than \$10,000. Contracts that have an estimated cost of less than \$10,000 may be procured using an informal process with at least one written quote secured prior to awarding the contract. This process requires the Purchaser to develop a written scope of the project and criteria used to select the service provider.
3. Contracts \$10,000 or More and Less Than \$35,000. Services may be procured using an informal process with at least 3 written quotes secured and evaluated prior to making an award. This process requires the Purchaser to develop a written scope of the project and criteria used to select the service provider.
4. Contracts in Excess of \$35,000. Services estimated to cost more than thirty-five thousand dollars may be performed by contract when the services: cannot be performed on a timely basis by employees of Pierce Transit; or are not part of the routine assignment for such employees; or require specialized professional or technical expertise not available from such employees. Services shall be procured using a formal request for proposal (RFP) process. The development of an RFP along with the proper public notification, or by sending the RFP to consultants on the MRSC Roster, shall be made in accordance with procedures adopted by the procurement department in the best interest of Pierce Transit. At a minimum, the RFP must include a brief description of the requested services (scope), a projected procurement timeline, and the criteria to be used for evaluating the proposals. Price must be weighted at least as high as any other evaluation criteria.

- D. Change Orders for Professional, Personal and Purchased Services.** Where contracts have been awarded for Professional, Personal or Purchased Services, and under which the work is in progress, and individual changes are necessary to properly accomplish the work, the

following individuals are authorized to execute individual change orders to the contract under the following conditions:

1. Executive Director, provided that:
 - a. The individual change order does not exceed \$20,000, and
 - b. The revised total of the contract is within the approved contract budget.
2. Executive Director of Finance, provided that:
 - a. The individual change order does not exceed \$35,000, and
 - b. The revised total of the contract is within the approved contract budget.
3. The Chief Executive Officer may execute change orders in any amount, so long as the cumulative change order amount plus the original contract amount does not exceed the CEO's signature authority or the current Board authorized contract total.

In all other cases, the change order requires the Board of Commissioners or delegated Committee approval.

Miscellaneous

- A. **Real Property.** The CEO is authorized to acquire real property and interests in real property through purchase agreements, leases, rental agreements, operating agreements, licenses, easements, use and access permits, rights of entry and other use agreements where funding is within authorized budget limits, the term of the agreement does not exceed five years (including options), and the total monetary commitment over the agreement term does not exceed \$200,000. Contracts for property acquisition or use in excess of the CEO's contract authority of \$200,000 but less than one million dollars may be approved by Committee. All other requirements for such real property transactions as stated in the Pierce Transit Code Section 3.13.110 must be followed.
- B. **Capital Projects.** The CEO is authorized per Board Resolution 03-070 to approve capital project budget changes up to \$50,000, including transfers between funds.
- C. **Telecommunications and Data Processing Purchases.** Pierce Transit may use the competitive negotiation process when purchasing telecommunications and electronic data processing equipment, software or services instead of traditional competitive bidding as allowed in RCW 39.04.270. This alternative process requires:
 1. A request for proposals must be published in a newspaper of general circulation at least 13 days before the submission deadline.
 2. The RFP must identify evaluation factors, including price.
 3. Reasonable procedures for technical evaluation of the proposal must be used for awarding the contract.
 4. The contract must be awarded to the qualified bidder whose proposal is most advantageous to Pierce Transit.
 5. The agency may reject all proposals for good cause and request new proposals.

- D. **Electronic Signature.** It is the policy of Pierce Transit that whenever the use of a written signature is authorized or required on a record, an electronic signature may be used with the same force and effect as the use of a signature affixed by hand, provided the electronic signature conforms to the definition in RCW 19.360.030 and the writing conforms to RCW 19.360.040. Any electronic signature must be applied by or authorized by the person with authority to sign the record and bind that party or their company to the intent or transaction.
- E. **Electronic Record.** It is also the policy of Pierce Transit that records may be stored electronically provided that the record is the same as if it were stored in non-electronic form. An electronic record may be deemed to be the Agency's source record for purposes of production and retention under the Washington State Public Records Act and Washington State Records Retention schedules.

Related Policies and Procedures

In addition to this Manual, the following policies, procedures or guidelines should be cross-referenced and complied with:

- A. Pierce Transit Code
- B. Pierce Transit Electronic Signatures and Records Policy
- C. Pierce Transit Procedures and Guidelines for Preventing Organizational Conflicts of Interest (OCOI) In Procurement, attached as Exhibit B and incorporated herein;
- D. Pierce Transit Authorization Summary, attached as Exhibit A and incorporated herein;
- E. Pierce Transit procedures on:
 - 1. Purchasing Cards
 - 2. Purchasing Protests and Appeals (specified in applicable bid solicitation documents) and attached as Exhibit C
 - 3. Sole Source Justification (form necessary for all Sole Source approvals)
 - 4. Surplus
 - 5. Rolling stock procurements
 - 6. Disadvantaged Business Enterprise (DBE) Program and Small Business Enterprise (SBE) Participation
 - 7. Procedures for FTA – Funded purchases
 - 8. Business and Travel Expense Procedures Manual
- F. For purchases funded, in whole or in part by the Federal Transit Administration (FTA), the following FTA publications:
 - 1. FTA Circular 4220.1F, Third Party Procurement
 - 2. Best Practices Procurement Manual
 - 3. Third Party Procurement

Exhibit A
Authorization Summary

The following tables provide summaries for the authorization levels in this document. The authorizations assume that the expenditures are provided for in the adopted operating or capital improvement budgets. If an operating expenditure would cause the adopted operating budget to be exceeded, or a capital project is not included in the capital improvement budget, the Board must authorize a budget amendment prior to contract signing.

PIERCE TRANSIT PURCHASING AUTHORIZATION SUMMARY

The following table summarizes authority levels that may be delegated by Executive Directors to approve purchase requisitions for Materials, Supplies and Equipment. All Purchases other than Materials, Supplies and Equipment require a contract and are subject to the Contract Authorization limits. (Additional approvals are established below for purchases made through the Warehouse for inventoried maintenance parts).

MATERIALS, SUPPLIES AND EQUIPMENT		
Level Definition	Process	Signature Authority
User	No quotes, "fair and reasonable price" determination required	Up to \$3,500
Level 1 (required)	No quotes, "fair and reasonable price" determination required	Up to \$10,000 (a)
Level 2	Requires a minimum of 3 verbal quotes*	Up to \$20,000 (b)
Level 3	Requires a minimum of 3 written quotes*	Up to \$35,000
Executive Director	Formal Bid	Up to \$75,000
Executive Director Finance	Formal Bid	Up to \$200,000

* A Vendor List should be used for purchases between \$10,000 and \$50,000 when a formal bid process is not used per the process provided in RCW 39.04.190. Pierce Transit has contracted with MRSC to maintain a vendor roster for this purpose.

(a) Up to \$20,000 if no approver designated in Level 2, and \$35,000 if no approvers designated in Levels 2 and 3

(b) Up to \$35,000 if no approver designated in Level 3

PIERCE TRANSIT CONTRACT AUTHORIZATION SUMMARY

PUBLIC WORKS		
Dollar Limit	Process	Signature Authority
\$20,000 or less	Requires a minimum of 1 written quote or select a contractor from the Small Works Roster (SWR). May use Limited Public Work (LPW) process under \$50,000.	Executive Director
\$20,001 - \$40,000	Requires a minimum of 3 written quotes or select a contractor from the SWR. May use LPW under \$50,000.	Executive Director
\$40,001 - \$350,000	Requires competitive bids. May use the LPW (up to \$50,000), SWR, or advertisement.	Up to \$75,000 – ED of Finance \$75,000 - \$200,000 - CEO \$200,001 - \$1,000,000 – EFC/SDCC Over \$1,000,000 - Board
Over \$350,000	Formal Competitive Bids	Up to \$1,000,000 – EFC/SDCC Over \$1,000,000 - Board
Up to \$500,000 per Work Order	JOC Work Orders - each work order treated as separate contract	Up to \$40,000 – Executive Director \$40,001- \$75,000 – ED of Finance \$75,000 - \$500,000 - CEO
MATERIALS, SUPPLIES AND EQUIPMENT		
Dollar Limit	Process	Signature Authority
\$10,000 or less	No quotes, “fair and reasonable price” determination required	Executive Director
\$10,001- \$20,000	Requires a minimum of 3 verbal quotes*	Executive Director
\$20,001 - \$35,000	Requires a minimum of 3 written quotes*	ED of Finance
Over \$35,000	Formal Bid	Up to \$200,000- CEO \$200,001 - \$1,000,000 – EFC/SDCC Over \$1,000,000 - Board

* A Vendor List should be used for purchases between \$10,000 and \$50,000 when a formal bid process is not used per the process provided in RCW 39.04.190. Pierce Transit has contracted

with MRSC to maintain a vendor roster for this purpose.

PROFESSIONAL SERVICES (Architect and Engineering)		
Dollar Limit	Process	Signature Authority
\$35,000 or less	Chosen from consultant roster or formal RFQ	Up to \$20,000 - Executive Director \$20,001 - \$35,000 ED of Finance
Over \$35,000	Formal RFQ process	\$35,001 - \$200,000 - CEO \$200,001 - \$1,000,000 – EFC/SDCC Over \$1,000,000 - Board
PERSONAL AND PURCHASED SERVICES		
\$10,000 or less	At least one written quote	Executive Director
\$10,001 - \$35,000	At least 3 written quotes	Up to \$20,000 - Executive Director \$20,001 - \$35,000 ED of Finance
Over \$35,000	Formal RFP	Up to \$200,000 - CEO \$200,001 - \$1,000,000 – EFC/SDCC Over \$1,000,000 - Board

WAREHOUSE		
Dollar Limit	Process	Signature Authority
\$10,000 or less	Trapeze system generated replenishment process may be used to determine fair and reasonable pricing. A quote process may be used if determined in the best interest of the agency.	Warehouse Staff
\$10,001 - \$35,000	For any “one-item” purchase requires 3 written quotes. Trapeze system generated replenishment process may be used for inventoried maintenance parts for same or like item purchases.	Warehouse Staff
\$35,000 - \$75,000	Formal Bid or 3 written quotes. If a Trapeze system generated replenishment purchase for inventoried maintenance parts for same or like item purchases, Executive Director approval is required at the time of Requisition.	Executive Director of Maintenance
\$75,000 or more (Fuel)	Purchase Order. Fuel purchases will utilize the Washington State Department of Enterprise Services Master Contract for Bulk and Will-Call Fuel	Executive Director of Maintenance
\$75,0000 - \$200,000	Formal bid	Executive Director of Finance
Over \$200,000	Formal bid	\$200,001 - \$1,000,000 EFC/SDCC Over \$1,000,000 Board

*OEM purchases require the same signature authority, however, may not follow the same process. See OEM definition on page 4.

*Warehouse may determine that a competitive process and a short or long-term Contract may be necessary and should be processed through the Purchasing Department for purchases involving a service component, purchases with specific terms and conditions or for parts or equipment manufactured or customized specifically for Pierce Transit.

**PIERCE TRANSIT CHANGE ORDER and
AMENDMENT AUTHORIZATION SUMMARY**

PUBLIC WORKS	
Dollar Limit	Signature Authority
\$10,000 or less	Project Manager
\$10,001 - \$40,000	Executive Director
\$40,001 - \$75,000	ED of Finance
Over \$75,000 to \$200,000	CEO, provided the cumulative change order amount does not exceed the approved project contingency
Increase original Committee or Board authorized contract amount or if requires budget amendment over \$50,000	EFC/SDCC or Board, issue to return to group that made initial approval
PROFESSIONAL, PERSONAL AND PURCHASED SERVICES AND MATERIALS, SUPPLIES AND EQUIPMENT	
Dollar Limit	Signature Authority
\$20,000 or less	Executive Director
\$20,001 - \$35,000	ED of Finance
Over \$35,000 - \$200,000	CEO
Increase original Committee or Board authorized contract amount	EFC/SDCC or Board, issue to return to group that made initial approval amount.

Exhibit B
Pierce Transit
Procedures and Guidelines for
Preventing Organizational Conflicts of Interest (OCOI)
In Procurement

I. Introduction and References

Pierce Transit follows pertinent state and federal laws regarding OCOI. Nothing contained herein is intended to limit, modify, or otherwise alter the applicability or effect of relevant law, rules, and regulations. All such laws, rules, and regulations shall apply in the usual course without respect to these guidelines.

Pierce Transit evaluates the following on a case-by-case basis:

1. Whether or not an OCOI exists;
2. Whether or not the OCOI can be avoided or neutralized; and
3. The appropriate steps to avoid or neutralize OCOI.

In evaluating the above, Pierce Transit relies on the following authorities:

- Washington State has adopted ethical standards set forth in RCW 42.52 that specifically address ethics in public service; though RCW 42.52 does not specifically apply to Pierce Transit, Pierce Transit looks to these laws as guidance and would use these standards in evaluating OCOI, and for purposes of addressing OCOI, these standards shall be construed to apply to all employees of Consultants and/or Sub-Consultants that perform work on Pierce Transit projects.
- RCW 18.43 addresses prohibited conduct and acts related to the practice of engineering. Conflicts of interest are referenced under RCW 18.43.105(6).
- The Board of Registration tasked with the oversight of engineers and land surveyors pursuant to RCW 18.43 has promulgated a set of rules of professional conduct and practice that addresses conflicts of interest in WAC 196-27A-020-2(i).
- The Federal Transit administration (FTA) addresses OCOI in relation to federally funded projects in general in the FTA Procurement Circular 4220.1F. The subject of conflicts of interest is covered in the BPPM, Section 2.6 - Organizational Conflicts of Interest. Pierce Transit relies on this guidance for use on all Pierce Transit contracts, whether federally funded or not.
- The Pierce Transit Code, adopted by the Pierce Transit Board of Commissioners, provides at Section 3.13 that all purchases be competitively procured, and without conflict of interest.

II. Scope

- 2.1 These guidelines apply to Pierce Transit's procurement and contracts and, under particular circumstances, the eligibility of professional design consultants for contract award as prime consultants or participation as sub-consultants.

- 2.2 Consultants, Sub-consultants, Contractors, and Subcontractors are encouraged to investigate and manage any potential OCOI well in advance of forming teams or considering participating with a Submitter/Proposer on a contract. A firm or individual considering whether to enter into a contract as a Consultant or Sub-consultant on a Pierce Transit project should consider contacting Pierce Transit's Procurement Manager as to whether its proposed scope of work may create an OCOI if the firm or individual chooses to elect in the future to participate with a proposer on a contract related to the firm's or individual's work product.

III. Definitions and Underlying Principles

- 3.1 Organizational Conflict of Interest (OCOI) means that because of other activities, financial interests, contracts or relationships with other persons or entities, a person or entity:

- A. Is unable or potentially unable to render impartial assistance or advice to Pierce Transit;
- B. Is or might be otherwise impaired or might be otherwise impaired in its objectivity in performing the contract work; or
- C. Has or could have an unfair competitive advantage.

An OCOI may exist due to an appearance or a perception of a conflict of interest, even if no actual or current conflict is present.

- 3.2 The two underlying principles for OCOI are:

- A. Preventing the existence of conflicting roles that might bias a contractor's judgment; and
- B. Preventing unfair competitive advantage. In addition to other situations, an unfair competitive advantage exists where a contractor competing for award:
 - 1. Possesses proprietary information that was obtained without proper authorization; or
 - 2. Possesses information that is relevant to the contract but is not available to all competitors, and such information would assist that contractor in obtaining the contract; or
 - 3. Under a prior contract with Pierce Transit, and as a result of the work performed under the prior contract, was in a position to design or develop future work/project in such a manner that the contractor would have an unfair advantage in competing for the contract for the future work.

IV. Guidelines

- 4.1 Pierce Transit is required to provide full and open competition for its procurements and avoid conflicts of interest. Pierce Transit may need to balance these two interests by restricting full and open competition to remedy an actual or potential personal or organizational conflict of interest. If a

restriction is required, the restriction will be narrowly tailored, as much as reasonably possible, to remedy the conflict of interest. Pierce Transit will award the contract to the successful submitter unless Pierce Transit, in its sole discretion, determines that an actual or potential conflict of interest exists that cannot be avoided or mitigated. While Pierce Transit staff will address each situation on a case-by-case basis, these guidelines will inform the determinations:

- A. Identifying the OCOI. All respondents to procurement requests will be required to sign a OCOI Certification Statement. If a respondent self-identifies an actual or potential OCOI in the statement, Pierce Transit staff will evaluate the OCOI and work with the respondent to determine if the OCOI is one that can be remedied or if it is a disqualifying item. Pierce Transit may also independently evaluate whether an OCOI exists.
- B. Addressing and/or Remediating the OCOI. Not all competitive advantages are unfair or disqualifying, and whether a competitive advantage is unfair or not depends on the circumstances. If an advantage is determined to be unfair, some situations may be remedied by further discussions with Pierce Transit and ensuring that future action is not biased by any prior relationship between Pierce Transit and the respondent. Once an OCOI has been identified or disclosed, Pierce Transit will consider whether that OCOI can be remedied or mitigated. Options for remediating or mitigating an OCOI could include: determination of whether there is a financial interest at stake by employees or agents of the proposed contractor; precluding certain staff members of the contractor from working on the Pierce Transit project; providing equal and full information to all proposers; requesting that certain Board of Commissioner members abstain from voting on a contract award; limiting the scope of work that can be awarded now or in the future; and/or or the like.
- C. Proactively preventing OCOI. There may be situations in which Pierce Transit will preclude firms that have been awarded certain work from competing for subsequent work, to prevent potential OCOI. A consultant may be prohibited from competing for future work on a project when the future work is contingent upon the outcome or recommendations of the consultant's work under a prior contract. Other exclusions may occur when a consultant's work on a project provides inside information that may benefit them in bidding for future work on the same project. An example of this could be:

A consultant prepares preliminary cost estimates for a project, separate from the project design award. Preparing the cost estimates could provide the consultant advance knowledge of the potential design and project specifications that would provide an unfair advantage. The consultant would therefore be disqualified from competing for the project design award.

Approved By:

Brett Freshwaters

Executive Director of Finance

Date: _____

Exhibit C

PROTEST AND APPEAL PROCEDURE

Any actual or prospective bidder, including subcontractors and suppliers showing a substantial economic interest in the bid, that is allegedly aggrieved in connection with the solicitation or award of a Contract may protest to Pierce Transit in accordance with the procedures set forth herein. Protests based on the specifications or other terms in this Request for Proposals which are apparent prior to the date established for submission of proposals, shall be submitted to and received by Pierce Transit's Procurement Manager no later than seven (7) calendar days prior to said date. Protests based on other circumstances shall be submitted to and received by Pierce Transit's Procurement Manager within seven (7) calendar days after the protesting party knows or should have known of the facts and circumstances upon which the protest is based; provided, however, that in no event shall a protest be considered in the event all proposals are rejected. Full compliance with the procedures for filing and documenting protest shall be a condition precedent to filing any further protest with the Federal Transit Administration (FTA) or to filing litigation. For the complete Protest and/or Appeal procedures, contact the Purchasing Department at Pierce Transit.

To be considered, a protest shall be filed in a timely manner in writing and shall include:

1. The name and address of the protesting party;
2. The contract number and contract title under which the protest is submitted;
3. A detailed description of the specific grounds for protest and any supporting documentation; and
4. The specific ruling or relief requested.

The written protest shall be addressed to:

Pierce Transit
Procurement Manager
3701 96th Street SW
P.O. Box 99070
Lakewood, WA 98499-0070

Upon receipt of a written protest, Pierce Transit will promptly consider the protest. If any of the required information is omitted or incomplete, Pierce Transit will immediately notify the protester in writing. The missing information must then be submitted to Pierce Transit within seven (7)

calendar days if the protest is to be further considered. Pierce Transit may give notice of the protest and its basis to other persons, including other bidders involved in or affected by the protest and such other persons may be given an opportunity to submit their views and relevant information.

If the protest is not resolved by mutual agreement with the protester, Pierce Transit will issue a decision in writing within seven (7) calendar days after receipt of the written protest or missing information, as applicable. The decision will state the reasons for the action taken and inform the aggrieved party of its right to appeal the decision to the Executive Director of Finance. A copy of the decision shall be mailed (by certified mail, return receipt requested) or otherwise promptly furnished to the protester and any other interested parties. The decision will be considered final and conclusive unless appealed to the Executive Director of Finance within seven (7) calendar days from receipt of the decision, then the subsequent determination of the Executive Director of Finance or his/her designee to be issued within seven (7) calendar days shall be final and conclusive. The Executive Director of Finance may base his or her decision on documents already submitted as part of the protest process and/or may request additional documentation.

A vendor shall have the right to appeal to the Pierce Transit Board of Commissioners if the vendor believes he/she has not received adequate remedy through the above measures. In no event shall a vendor be allowed to appeal directly to the Pierce Transit Board of Commissioners without having gone through the above steps. The vendor shall notify the Clerk of the Pierce Transit Board of Commissioners seven (7) calendar days in advance of the next scheduled meeting for the matter to be placed on the agenda. The Pierce Transit Board of Commissioners may uphold the decision of the staff or ask the staff to take whatever action may be necessary to remedy the matter. The decision of the Board of Commissioners shall be final and binding.

When a protest has been timely filed with Pierce Transit before contract award, Pierce Transit shall not make an award prior to seven (7) calendar days after issuing a decision on the protest, or if a protest has been filed with the FTA, during the pendency of the protest, unless in either situation Pierce Transit determines that:

1. The items or equipment are urgently required; or
2. Delivery or performance will be unduly delayed by failure to make the award promptly; or
3. Failure to make prompt award will otherwise cause undue harm to the interests of Pierce Transit or of the federal government.

Failure to comply with these protest procedures will render protest untimely and/or inadequate and result in rejection thereof by Pierce Transit. Compliance with these protest procedures shall be a condition precedent to commencement of litigation on the protest issues.

PROTESTS INVOLVING FEDERALLY FUNDED PROCUREMENTS

If a protest is received on a procurement that contains FTA funds, the FTA must be informed of the protest, the status of the protest and the resolution. Notifications should include a brief description of the protest, the basis of disagreement, what action was taken and if there is a likelihood of an appeal. The notification should be provided to the Agency's grant administrator for inclusion in the next quarterly Milestone Progress Report.

The protester cannot appeal to the FTA until he/she has exhausted all local remedies available in Pierce Transit's protest procedure.

If a protest cannot be settled at Pierce Transit's level the protester may appeal to the FTA as follows:

- The Protester must be an interested party.
- Must have exhausted all administrative remedies.
- Must appeal within five (5) working days after receiving Pierce Transit's final decision.

Pierce County Population Density - Person Per Acre

