

CAPITAL METROPOLITAN TRANSPORTATION AUTHORITY ACHIEVES 100% AUTOMATION WITH PLANETBIDS

OVERVIEW

Like most public agency procurement teams in 2020, the Capital Metropolitan Transportation Authority (CapMetro), was forced to go fully remote during the COVID-19 pandemic. But unlike many of its peers in public purchasing, CapMetro had already begun a significant push towards full digitalization years earlier.

In 2018, Austin, Texas-area agencies were all pushed toward adopting and implementing digital procurement processes led by eProcurement software. CapMetro awarded its contract to PlanetBids, a well-known name in procurement software in California with a platform geared toward government procurement.

Prior to this automation, all bids and RFP opportunities were published in the local newspaper, and bid processes were paper- and time-intensive for both the procurement team and bidders.

“The amount of paper used in the process was not supportive of our sustainability goals, something that is very important to our organization,” said Muhammad Abdullah, CapMetro Senior Director and Chief Contracting Officer.

THE CHALLENGE

Moving to an online system was only the first process. The team then reviewed existing templates for bids, IFB's and bid bonds, updating all boilerplate language. CapMetro created online training videos, allowing employees to deploy training resources virtually. Reports generated from the eProcurement system allowed the team to analyze and identify trends to drive new spending initiatives.

Fast forward to 2020, and CapMetro, like all agencies across the county, was forced to deal with the implications of COVID-19. While 70 to 80% of their implementation process was automated at the beginning of that year, automating the final portion suddenly became a priority.

"When the workforce transferred to off-site environments, our process needed to quickly move to 100% electronic," Abdullah said. "We examined the remaining components to question how they could be automated. Additional needs were addressed with new features and modules, as well as updating existing policies to reflect the new online procedures."

IT Urgency

Full digitalization and automation of all procurement processes was required immediate. PlanetBids was able to help CapMetro implement additional features quickly and easily, without major additional training or complicated customization. PlanetBids also assisted CapMetro in updating its procurement policies to reflect their new online procedures.

"Our board unanimously approved the implemented changes," Abdullah said. "Our philosophy is that policies and procedures should be reviewed and updated to always reflect new requirements."

Emergency Response

With the pandemic came an immediate need for emergency purchasing of goods and services to protect the public. PlanetBids' Emergency Operations functionality allowed CapMetro to quickly issue bids to purchase personal protective equipment (PPE), as well as support the IT Division with the computer and software purchases required to support a fully remote workforce. They were also able to, update existing contracts and migrate all employees to a fully-automated system at no extra cost.

Vendor Relationships

Suppliers and vendors needed to register online to be eligible for contracting opportunities. When goods and services were needed quickly to address the pandemic, CapMetro already had 1,550 companies registered within the system and ready to bid. With new types of emergency purchases popping up all the time, and with companies continually registered, CapMetro continued to grow their vendor pool.



PROCUREMENT ACTUALLY BECAME BUSIER WHILE TELECOMMUTING

– Julia A. Wilkes, Executive Assistant,
CapMetro Procurement Department

THE RESULTS: 100% AUTOMATION

CapMetro's initial efforts to automate significantly helped during the challenging times of 2020. Keeping ahead of upcoming challenges while continually improving a process can often be a struggle for many procurement organizations.

CapMetro's procurement team aims to frequently improve their procurement operations, often asking themselves, "How can we do better?"

"We are committed to steadfastly improving our process as an ongoing goal," Wilkes said. "The support of our management has enabled us to be more proactive in getting ahead of the proverbial curve."

CapMetro implemented PlanetBids to address digitalization and automation goals that would help the agency streamline and become more efficient:

BID MANAGEMENT

Simplifying Bid Creation, Release, and Award

- **Challenge:** CapMetro had an immediate need to move all procurement operations to a digital format so they could build bids and manage the solicitation process from anywhere while still collaborating across teams and departments.
- **Solution:** PlanetBids allows users to create bids from scratch or from templates, with multiple user access and status tracking in a comprehensive dashboard. Bids solicitations are released online and registered vendors notified immediately of a new opportunity.

VENDOR MANAGEMENT

Maintaining Successful Relationships with Suppliers

- **Challenge:** Vendors needed to be able to see all open opportunities, easily submit bids digitally, and be notified of awards virtually when in-person operations were suspended.
- **Solution:** PlanetBids' customized vendor portal allows potential bidders to download all bid documents, get notified of any changes or communications automatically, acknowledge addenda, and submit bids and any relevant documentation all in one place. CapMetro can track all bid responses and track vendor performance for better reporting and more competitive procurement.

CUSTOMER SERVICE

Working Together to Build a Successful Procurement Process

- **Challenge:** When all CapMetro employees were forced to work from home, CapMetro needed to quickly get their entire procurement team up and running remotely while adding new functionality and updating processes.
- **Solution:** PlanetBids' renowned, US-based customer service team helped CapMetro acquire and implement additional PlanetBids functionality and lent expertise in procurement best practices to help CapMetro update its policies and procedures for full digitalization. track vendor performance for better reporting and more competitive procurement.



RESULTS AND IMPACT

Since implementing PlanetBids, CapMetro has realized almost 100% paper-free automation, including:

Faster, more efficient bid processing

Moving from paper-based to digital bid submissions cut administrative time and allowed team members to work from anywhere.

Improved vendor engagement

With automated bid notifications, a robust vendor database, and digital submissions, vendor participation is consistent and competitive.

Enhanced Flexibility

CapMetro is focused on continuous improvement in processes and actively evaluates and updates policies and procedures to reflect the most efficient, fair, and cost-effective procurement operations for all parties.

WHY PLANETBIDS?

PlanetBids end-to-end procurement platform helps procurement professionals in the public, private, education, and non-profit sectors streamline their purchasing operations and improve vendor and supplier relationships for better budget and resource management.

- **Transparency First:** For the first time, all bids and contracts are available to the public without a login, ensuring total visibility and accountability.
- **Vendor-Friendly Registration:** Vendors quickly onboarded with minimal support, reducing administrative burden and improving vendor satisfaction.
- **Ease of Use for Staff:** Even non-tech-savvy team members found the system easy to navigate, accelerating adoption and reducing training time.

ABOUT CAPMETRO

The Capital Metropolitan Transportation Authority (CapMetro) is a public transportation provider operating bus services and a commuter rail system for 549 square miles and 26.3 million annual boarders in Austin and several suburbs in Travis and Williamson, Texas. With an operating budget of \$427 million and a capital budget of \$11 million, CapMetro maintains 2,500 bus stops across 71 routes, 26 park and ride/transit centers, 10 commuter rail stations along 32 miles of track, electric trains, paratransit vehicles, Metrobuses, bikeshares, vanpools, rapid vehicles, University of Texas shuttles, and freight rail.