



**Metropolitan  
Transit  
System**

# Procurement Overview

# Procurement Department Team

## 1. Procurement Team

- A. Director of Supply Chain and Operations (1)
- B. Manager of Procurement (1)
- C. Principal Contract Administrator (1)
- D. Senior Procurement Specialist (1)
- E. Procurement Specialists (9)
- F. Buyer (1)
- G. Contract Administrator (1)
- H. Contract Specialist (1)

- 2. Firms can reach out to the appropriate staff shown in the solicitation posted on PlanetBids. The contact information is located in the solicitation.
- 3. For all other questions, contact us at: [procurement@sdmts.com](mailto:procurement@sdmts.com).

# Procurement Overview

1. The MTS Procurement department is centralized and responsible for processing all purchase requisitions, issuing purchase orders and contracts for goods, equipment and services.
2. Types of goods and services we buy:
  - A. Goods such as parts for buses and trolleys, building cleaning supplies, uniforms
  - B. Services such as finance, marketing or IT related
  - C. Equipment used in cleaning facilities and stations, used in rail operations
3. How does MTS identify interested firms?
  - A. Search from registered vendors on PlanetBids
  - B. Past purchase history
  - C. Research online
  - D. Contact other similar agencies
  - E. Search on Caltrans website
  - F. Recommendations from Project Managers

# Methods of Solicitation

METHOD	\$	TYPE	MINIMUM COMPETITION REQUIREMENTS	NAME
MICRO PURCHASE	Up to \$5,000	Goods and/or Services	One (1) quote	Quote
SMALL PURCHASE	>\$5,000 to \$150,000	Goods and/or Services	Minimum of three (3) quotes	Request for Quotes (RFQ)
FORMAL PROCUREMENT	>\$150,000	Equipment, Goods and/or Services	Formal Procurement Process	Invitation For Bids (IFB)
	>\$150,000	Equipment, Goods and/or Services	Formal Procurement Process	Request for Proposals (RFP)
REQUEST FOR INFORMATION (RFI)	>\$5,000	Equipment, Goods and/or Services	Information gathering	Used on a case by case basis for gathering information. The intent is to do market research to ascertain what is available in the marketplace, potential vendors, and to assist in developing a SOW that would allow maximum competition. Most commonly used for IT software and marketing projects.
SOLE SOURCE	>\$5,000	Sole Source	One (1) quote	Permits noncompetitive proposals when circumstances warrant a sole source such as patents or restricted data rights, substantial duplication of costs, unique concepts and unacceptable delays.
PUBLIC WORKS	Public Works/Construction: In general, Public Works are procurements for construction, alteration, demolition, or repair work done under contract, and paid for in whole or in part with public funds. It also means the construction, repair, remodeling, alteration, conversion, modernization, improvement, rehabilitation, replacement, or renovation of a public building or structure. Also includes tree and landscape maintenance.			
	Up to \$1,000	Public Works including Construction	One (1) quote	Quote
	>\$1,000 to \$50,000	Public Works including Construction	Minimum of three (3) quotes, applicable prevailing wage requirements	Request for Quotes (RFQ)
	>\$50,000	Public Works including Construction	Formal Bid Process, prevailing wage requirements	Invitation For Bids (IFB)
	>\$50,000	Job Order Contracting (JOC)	Formal Bid Process, prevailing wage requirements	Invitation For Bids (IFB)
REQUEST FOR STATEMENT OF QUALIFICATIONS	>\$150,000	Services	Formal Procurement Process Architectural & Engineering (A&E) and Construction Management (CM) services	Request for Statement of Qualifications (RFSQ)
REQUEST FOR PREQUALIFICATIONS	>\$150,000	Construction Services	Formal Prequalification Process - Utilized to prequalify construction bidders	Prequalification

# Common Mistakes in Submittals

1. Forms - general:
  - A. Incomplete, unsigned, or missing forms. Firms should complete all forms and when a section is not applicable, indicate with N/A.
  - B. Submittal includes a “confidential” footer on most or all the pages. The California Public Records Act (CPRA) form is checked that submittal includes confidential information, but there is no accompanying letter explaining what is confidential and exempt from disclosure.
  - C. DBE program and debarment/suspension forms are not completed by both prime contractor and all its subcontractors as instructed in the solicitation.
  - D. Reference checks contacts have incorrect or missing information.
2. Bid form/cost proposal form:
  - A. Costs submitted in a different form/format instead of utilizing the form provided in the solicitation.
  - B. Firms adding new lines, editing the cost form, etc.

# Common Mistakes in Submittals – cont.

1. Bidders adding exceptions to an IFB.
2. Not submitting a technical proposal in response to an RFP.
3. Not submitting a Request For Approved (RFA) Equal by the deadline/or submitting pricing for items not approved
4. Submitting questions via email and not through PlanetBids as instructed in the solicitation.
5. Calls or emails to MTS to accept late submittals after the PlanetBids system has closed the solicitation.
6. Submitting marketing materials or unrelated submittals not part of the solicitation.

Please read the solicitation carefully and follow the instructions as award is either made to the lowest responsive, responsible bidder; or best value/negotiated.

# Tips and Helpful Hints: Submitting Responsive Bids and Proposals

1. Check all the deadlines in the calendar of events.
2. Allow enough time to upload your submissions. Do not be late.
3. Should you experience difficulty uploading your packet please seek help through the PlanetBids support tab.
4. Use the Prospective Bidder's tab to see other interested firms for subcontracting or supplier opportunities.
5. Complete and submit all forms included in the solicitation.
6. Only contact the designated Procurement staff shown in the solicitation.

# Common Requirements and Important Links

1. Depending on funding source, abide by funding agency clauses (e.g. federal, state etc)
2. Insurance certificates
3. Licensing - <https://www.cslb.ca.gov/>
4. DIR registrations - <https://sam.gov>
5. Project Labor Agreement (PLA) for construction projects over \$1M - <https://www.sdmts.com/PLA>
6. <https://www.sdmts.com/business-center/procurement/dbe>
  - A. Providing bonding assistance (e.g. bid bond, performance bond, payment bond)
  - B. Programs for financing, loans or grant opportunities
7. MTS PlanetBids: [www.sdmts.com/Business/Procurement.asp](http://www.sdmts.com/Business/Procurement.asp)



# Questions/Comments

# Upcoming Formal Goods, Services and Materials Procurements

Procurement Description	Anticipated Posting Date	Currently Posted - Bid Due Date
Ad Buying Software	6/17/2025	8/5/2025
Fire Extinguisher Maintenance and As-Needed Repairs	5/28/2025	8/8/2025
Rail Noise Suppression Lubricant	6/18/2025	8/13/2025
Homeless Encampment Cleanup	Summer 2025	
MSDS/SDS Online Database (Informal)	Summer 2025	
3rd Party Administration for SDTC Pension Plan	Summer 2025	
Actuarial Services	Summer 2025	
Commvault Metallic Application and Subscription	Summer 2025	
Crane Inspections and As-Needed Repairs	Summer 2025	
Community Outreach Consultant	Summer 2025	
Cisco, Hardware, Licensing Purchase & Renewal	Summer 2025	
SAP S/4HANA Implementation Consultant	Summer 2025	
Printing Timetables	Summer 2025	
Bus Transmission and Engine In-Frame Overhauls	Summer 2025	
Cummins Engine Parts	Summer 2025	
As-Needed Construction Management Services	Fall 2025	
Bus Brakes & Other Related Items	Beginning of 2026	
ADA Ticket Books	Beginning of 2026	
Light Rail Vehicle (LRV) Parts	Beginning of 2026	
Supply Bus and LRV Window Glass	Spring 2026	
As-Needed Architectural and Engineering Services	Spring 2026	
Scrap Metal Recycling Services (Revenue)	End of 2026	
LRV Brake Overhauls	End of 2026	

# Questions/Comments