

# HOW EAST SIDE UNION HIGH SCHOOL DISTRICT *AUTOMATED PROCUREMENT AND RESTORED EFFICIENCY* WITH PLANETBIDS

## HOW PLANETBIDS HELPED



### Efficiency

Going digital with bid release and submission cut admin time and enabled remote procurement.



### Vendor Engagement

Online prequalification and certification helped the district meet state participation requirements.



### Sustainability

Digital bids cut paper use and reduced the District's carbon footprint.

## OVERVIEW

East Side Union High School District in San Jose, Calif., was still performing procurement operations manually in 2015 when the District began to investigate digital procurement solutions.

The District was still using spreadsheets, a bid tracking whiteboard, and manual processes to manage bids and vendors its procurement operations.

East Side, which consists of 32 schools and more than 24,000 students, chose PlanetBids' end-to-end procurement platform in 2015 to help streamline all bid and vendor management tasks and help the District be more efficient and cost effective.



# THE CHALLENGE

## MANUAL PROCESSES

The six-person procurement team is responsible for all construction and bonding projects for the District, in addition to purchases of goods and services for its schools.

“Our department handles all design-build projects, as well as RFQs, RFPs, and bids,” said former Director of Bond Purchasing and Contracts Janice Unger, who is now retired from the District, said. “Originally, bids had to be submitted in person by contractors, with a public bid opening.”

Manual processes significantly slowed procurement for these complicated projects, which involve more detailed specifications and scopes of work, more line items, construction bonds, complicated insurance and certification requirements, and longer lifecycle times resulting in high-dollar contracts.

“Today, contractors submit all their documents online and no longer need to travel to the district offices to deliver those submissions,” Unger said.

After initially implementing Bid and Vendor Management to handle basic procurement, East Side then expanded its utilization of PlanetBids by incorporating Insurance Certificate Management, Business Certification, Contract Management, and Project Evaluation to their operations. With automatically generated expiration notices and self-management by suppliers, these additions allowed the District to better manage certifications and pre-qualifications, improve transparency and reporting, and minimize risk while further streamlining purchasing processes.

## GOING REMOTE

When the COVID-19 pandemic ramped up in 2020, District offices and campuses closed to students and employees. This was a major challenge for schools across the country – how to continue educational operations while keeping students and staff safe.

Yet, for the ESUHSD Bond Purchasing and Contracts team, the transition was seamless. Since the procurement processes were already online, the team continued their work virtually from home with very little adjustment.

With bid submissions done online, contractors appreciated that they could complete and submit a bid from the safety and convenience of their own homes. That year, the district awarded more than 100 contracts for projects, goods, and services.

Having just incorporated online Prequalification Management and Business Certification, the District was able to manage participation for Small Business Enterprise, Minority, and Diversity programs, as well as Contractor Prequalification, as required by the State of California.



The Contractor Prequalification program is integrated directly with the State Department of Industrialization's registration system. Since contractors cannot apply for District projects unless they are already prequalified by the state, it is imperative the system performs these checks.

"The timing was fortuitous," Unger said. "State offices were closed, yet the two systems could still communicate directly to ensure only prequalified contractors bid on District projects."

## THE SOLUTION

### BID MANAGEMENT

*Simplifying Bid Creation, Release, and Reward*

- **Challenge:** East Side Union High School District was struggling with manual processes like spreadsheets, whiteboards, and filing cabinets. Bids were difficult to track across teams, departments, and schools, and paper bid responses were received by hand and reviewed in public bid openings.
- **Solution:** PlanetBids allowed the District to track bids across departments in an easy-to-use, automated platform, and bid responses are now collected digitally and reviewed online through a collaborative process with clear evaluation criteria. When the District offices had to move to remote work, the procurement team didn't miss a beat thanks to digitalization of all procurement processes.

### VENDOR MANAGEMENT

*Maintaining Successful, Compliant Relationships with Vendors*

- **Challenge:** Expired insurance certificates and invalid business certifications caused bottlenecks, slowed down important projects, and put the District at risk of compliance issues. Communication with suppliers was slow and unreliable.
- **Solution:** PlanetBids' allows suppliers to directly upload their own certifications and pre-qualifications and automatically notifies the District of upcoming expirations. Improved reporting shows ESUHSD which vendors are delivering on time and to specifications to maintain strong relationships, and a wider vendor pool helps the District get more competitive contracts.

### CONTRACT MANAGEMENT

*Building a More Transparent Procurement Process*

- **Challenge:** Tons of large, complicated construction, design-build, and bonding projects meant piles of paperwork to file, often leading to lost documentation or time-consuming searches through filing cabinets. Reporting was slow and unreliable, and transparency was lacking for the public.
- **Solution:** PlanetBids' provides centralized editing and tracking of contract details and revisions, as well as comprehensive subcontractor data management, for advanced reporting and auditing capabilities. The project team can also schedule upcoming tasks and automated emails to vendors and subcontractors to keep projects running on schedule.



# RESULTS AND IMPACT



## OUR TEAM CAN QUICKLY FIND WHAT IS HAPPENING WITH ANY BID OR CONTRACT – WE LIVE IN THIS SYSTEM!

– Janice Unger, Former Director of Bond Purchasing and Contracts, ESUHSD

PlanetBids helped East Side Union High School District realize complete automation and efficiency in bidding while allowing its community suppliers a greater chance to compete for work.

### Faster, more efficient bid lifecycles

Moving from paper-based processes to digital bid release and submission cut administrative time and allowed procurement to continue remotely.

### Improved vendor engagement

Online prequalification and business certification management allowed the district to meet participation requirements from the state.

### More sustainable purchasing

Digital bid creation and submissions reduced paper usage and lowered the District's carbon footprint.

### 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 EAST SIDE UNION HIGH SCHOOL DISTRICT

The East Side Union High School District serves approximately 24,500 students, teachers, and staff across 19 high schools on the eastern side of San Jose, California. The schools include 11 traditional and 7 alternative high school programs, as well as an Adult Education Program that serves an additional 26,000 students.