



JEFFERSON COUNTY, NEW YORK, AIMS FOR PAPERLESS WITH PLANETBIDS

HOW PLANETBIDS HELPED



Efficiency

Shifting from manual, paper-based processes saved the county valuable time and eliminated back-and-forth.



Vendor Communication

An online bid portal centralizes and simplifies supplier registration, notification, and submission.



Visibility

Centralized documentation provides a quick, accurate snapshot of project status for stakeholders.

OVERVIEW

For Mike Bagley, Purchasing Director at Jefferson County, New York, time is everything.

With a 35-hour work week and a small staff, there's not a lot of extra time to waste shuffling through documents and tracking down information. But prior to adopting PlanetBids, that was the County's reality: mounds of paperwork and after-hours job stress.

PlanetBids digital procurement system brought order to the chaos and helped eliminate the stacks of paper, making the County's procurement operations more efficient, transparent, and straightforward.

In fact, the County performed its first completely paperless procurement from start to finish in December 2025, just a few short months after going live in the PlanetBids system.



But the real catalyst for the change was Bagley's insistence on a work-life balance for his staff.

"I tell my team all the time that when they go home, they shouldn't be taking all the stress of work with them. You shouldn't have to be overwhelmed Monday through Friday with how much work you have and then go home and be stressed because all you see in your mind are all these stacks of paper across your desk that you haven't gotten to or buried in emails you can't get to."

THE CHALLENGE : STACKS OF PAPERWORK

When Bagley took over as Procurement Director in Jefferson County, a mid-sized community of 115,000 in upstate New York, the County was creating solicitations from scratch for each purchase, utilizing spreadsheets to track vendors, and emailing them individually when new projects were released.

"When I saw all the paper on my first day and some of our internal processes with approving requisitions, it was a really arduous process, more so than it needed to be," Bagley said. "I look at those as time-wasting activities. If we're wasting that much time, what are we not getting to that we could get to?"

Bagley immediately set out searching for a digital procurement system that would streamline the purchasing process and remove the paperwork, freeing up his team's time for more strategic work. He looked at several systems, including PlanetBids, a relative newcomer to the East Coast after more than 25 years serving public agencies in California and the West Coast.

The decision between PlanetBids and two other well-known eProcurement systems came down to a few key points: customer service, quality of training, and support.

"We wanted to have somebody who would support the vendors so the heavy lift didn't fall on us as we're trying to build out this system. The system itself is intuitive too – it's easy to navigate, and it's user-friendly."

Price was also a key factor for the County. PlanetBids came in at a significantly lower price point than the other options, while still providing the same – or more – functionality and features. That made it easier to get buy-in from legislative decision makers.

All of these factors together helped the County become the first PlanetBids user in the state of New York. But Bagley wasn't nervous about being a test case, having spoken to other East Coast users such as the City of Salisbury, Maryland, which had switched to PlanetBids from a different system, before signing the contract.



...THE MORE VENDORS YOU HAVE, THE EASIER IT IS TO MISS SOMEONE WHEN IT'S IN A SPREADSHEET.

Mike Bagley, Purchasing Director



THE SOLUTION: PLANETBIDS

PlanetBids helped the County simplify a complicated procurement process, condensing the timeline while still following state guidelines and mandated processes. Solicitation templates help the team create new projects and release them quickly, and vendors are notified automatically when new opportunities are posted.

Vendors can now submit bids electronically, although by law they are still allowed to submit in person, by mail, or by carrier.

The adoption process from suppliers was relatively smooth, with only a few pushbacks in the beginning.

“When we put out the solicitation, now we only put the link to our website that then links them to our bid portal,” Bagley said. “We have a whole database of vendors, and it’s easy for them to sign up for a profile to get notifications. The more vendors you have, the easier it is to miss someone when it’s in a spreadsheet.”

Bagley said creating new solicitations is now more straightforward as well, with no need to change screens between different programs constantly. And Contracts allows the team to put in dates as reminders for when a certification or contract will expire so they are reminded to follow up for renewal in a timely manner.

THE RESULTS: PAPER-FREE PROCUREMENT

Buy-in from Bagley’s team was hit or miss, at first, with some buyers more used to the old way of doing things and others more willing to take on new technology.

But Bagley asked his entire team to trust him until they saw the end result, which was a more automated electronic process that made their lives easier.

“There were a lot of conversations to get their buy-in,” he said. “But 18 months into it they see the benefit of using it, and they like it quite a bit. Even our 26-year veteran is on board and loves working with PlanetBids.”

The most impactful outcome for Bagley, however, is his visibility into bid and RFP status. When legislators and stakeholders ask where a purchase is in the lifecycle, he no longer has to tell them to wait until he can dig through piles of paper or guess.

This is also helpful whenever there’s an issue or bottleneck in the process, allowing him to log in and see exactly where the misstep is and work on correcting it.

The County is even performing bid openings electronically, and is swiftly moving in the direction to implement fully paperless processes, including the RFP and bid acceptance process.



And while Bagley is proud of the progress his team has made, the most important factor, for him, is giving his staff a better work-life balance.

“At the end of the day, their quality of life matters to me,” he said. “I want purchasing, as much as it can be, to be a stress-free environment. When you go home, your mind should be clear of your work stresses so that you can spend time with your family.”

SOLICITATIONS

Simplifying RFX Creation and Release

- **Challenge:** Manual processes and paperwork stretched the timeline between request acceptance and release to bid, with tons of paperwork and disjointed processes slowing down operations.
- **Solution:** PlanetBids allows the County to go from Request to Creation to Release in just a few clicks, with reusable and customizable templates for any RFX situation.

VENDORS

Centralizing Communication and Improving Supplier Outreach

- **Challenge:** Vendor lists tracked in spreadsheets and notifications sent by email left room for errors, missed communications, and lack of competition.
- **Solution:** PlanetBids allows vendors to register themselves and automatically notifies them of new opportunities, centralizing Q&As and addenda so nothing is missed.

CONTRACTS

Organizing Contract Documents for More Transparency

- **Challenge:** Scattered paperwork and confusing spreadsheets made it hard to track and report on project status.
- **Solution:** PlanetBids keeps all relevant documentation in one central location for easy access, improving transparency and reporting efficiency.

EVALUATIONS

Streamlining Bid Scoring and Awarding Processes

- **Challenge:** Complicated scoring rubrics and broken spreadsheets made evaluations messy and left the agency open to bid protests.
- **Solution:** PlanetBids sets clear scoring criteria, automatically calculates totals, and allows the County set access roles for greater defensibility and transparency.



RESULTS AND IMPACT

PlanetBids allowed Jefferson County move to full electronic automation, helping the County perform its first fully paperless procurement project in 2025. The County is now more efficiently utilizing its time and resources while eliminating the risks inherent in paper-based processes.

STREAMLINED SOLICITATIONS

Moving from manual and paper-based processes to digital solicitation creation saves the County hours of work and headaches.

IMPROVED REPORTING

Centralized status tracking and contract storage gives the County the ability to report on project status immediately.

BETTER VENDOR EXPERIENCE

Self-registration and automatic notifications for new opportunities ensure all relevant vendors have an opportunity to bid, improving competition for more responsible use of public funds.

ABOUT 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.

Built and supported by procurement experts, for procurement professionals, PlanetBids is created to be feature-rich and powerful, while also easy to use, supporting sustainability and community empowerment.

ABOUT JEFFERSON COUNTY, NEW YORK

Founding in 1805, Jefferson County is home to 115,000 people across an 1,857-square-mile stretch of Northern New York, along Lake Ontario and the St. Lawrence River. Known for the Thousand Islands, which offer boating, fishing, and scenic views, Jefferson County is also home to Fort Drum and boasts a low cost of living and low crime rate.