**Exhibit 2: Proposed Bid-Contract Process**

**Department identifies the need for a purchase. Department gets approval to solicit for bids placed on a Commissioner’s Court agenda.**

**CC approves advertising a bid. The record gets created by Purchasing Analyst with initial information:**

**Number (automatically assigned sequentially by the system)**

**Title (text entered)**

**Type of Bid (drop-down)**

**Commodity type (drop-down)**

**Department (drop-down)**

**Department Contact (drop-down flowdown from Department)**

**Purchasing Analyst (drop-down)**

**CC date approved to advertise (mini calendar)**

**Due date for specs submittal (mini calendar)**

**Attached back-up from CC (attachment)**

**Analyst assigns task to Department Contact to submit draft specs via attachment(s) within two weeks from CC-approval date. Two weeks is default but can be adjusted by Purchasing Analyst.**

**Auto alert sent to Contact immediately after record is created that the record has been created and draft specs are due two weeks (or adjusted time frame) after CC-approval date.**

**Reminder sent to Contact two days (default) before due date if not completed by then.**

**If Contact doesn’t upload draft specs by deadline, alert is sent to Contact and copies Analyst notifying that deadline has been missed. Analyst sets a second deadline, re-tasks the Contact, immediate auto-alert sent, and two day reminder automatically sent if need be. Process repeats until task is completed.**

**Form 176 also a required form from Contact. Same procedure as above gets activated (task with reminders) or maybe it can be rolled up into one task with two required components.**

**Contact uploads the draft specs and assigns task to Analyst to review/edit/return for corrections/approval. All drafts and communications are captured in the system to provide a record.**

 **Draft specs (attachment), possibly multiple**

**Analyst approves specs. Once specs are approved the following fields become active and Analyst and Contact jointly determine:**

**Advertising date (mini calendar)**

**Day to mail packages (mini calendar)**

**Pre-Bid Conference (mini calendar) – not required**

**Deadline for questions (mini calendar)**

**Bid opening date (mini calendar)**

**Analyst updates system with above information.**

**Analyst uses the system to customize the following standard forms:**

**Advertising Sheet**

**Bid Document**

**with the following standard information:**

**Number**

**Title**

**Bid Opening Date**

**A Bidders list produced in a form ready for printing as mailing labels is also generated based on vendor information associated with the commodity type (this will entail a vendor database).**

**Bid is advertised and all documents are included as attachments in the system for future reference. Addendums (drafts and finals) are handled via tasks, emails, and attachments within the system. Any information that needs to be altered can only be done so by the Analyst (e.g. bid opening date).**

 **Addendums (mini-calendar), possibly multiple**

**Bid is opened. Analyst uses the system as much as possible to create and upload evaluation documents.**

**Bid Tab**

**If the evaluation requires Contact input, Analyst assigns task to Contact to complete the evaluation and uploads the shells of the evaluation documents. Same alerts go out and same process follows as the bid specs portion.**

**Analyst ultimately approves final version of evaluation documentation. The intended awardee response is scanned into the system for record. Analyst then uses the system to create a Bid Summary Form displaying some of the basic bid information from above (advertising date, bid opening date, etc.). Analyst decides what else needs to go as back-up to the agenda item (e.g. bid tab). A single file containing all agenda back-up is created and a task for Contact is made to review the back-up, upload anything additionally, and approve it.**

 **Bid Summary Form**

**Once Contact has approved all agenda back-up and certified it as accurate and they are in agreement with award the following fields become active and Analyst and Contact jointly determine:**

**CC date to approve award (mini calendar)**

**Analyst creates a task for County Clerk to pick up the back-up and post on the desired CC date. Immediate alert to the County Clerk and copy Contract Administration Manager. No follow up reminder alerts because the timing is usually short to post the item.**

 **C.M. reviews the scanned (soon to be awarded) bid for details and if anything looks odd C.M. contacts either the Contact or the Analyst to resolve the issue before CC happens. C.M. also performs indebtedness and certification checks on the to-be-awarded vendor.**

**C.M. watches for agenda posting and verifies that the item was correctly posted. If an item gets delayed, C.M. changes the CC date in the system.**

**Item goes to CC and gets approved. C.M. marks item as awarded in the system to lock all data entered to-date. Analyst becomes read-only at this point.**

**C.M. emails Contact to see if the awarded bid will need to be turned into a contract. If not C.M. marks record as such and activates a set of additional fields related to bid management. C.M. completes various fields of information based on the awarded bid as follows:**

**Date of execution**

**Term of contract**

**Extension options/requirements**

**Legal name of awarded vendor**

**Awarded vendor contact details**

**Description of services/product**

**Required timeframes of service/delivery**

**Outputs required**

**Requirements such as licenses, credentials, insurances, etc.**

**Audit requirements (if applicable)**

**Specific milestones or results to be produced (if applicable)**

**Cancellation requirements**

**Any other departmental contacts who should be notified about bid administration developments in the future**

**C.M. sets Contact as a user who can upload documents and make requests only (no editing of fields). Contact manages the terms of the awarded bid and C.M. intervenes only when tasks are not being completed or there are compliance issues.**

**Alerts are set up automatically defaulted based on pre-determined set of rules. For example, if the contract is a one year contract with a single option to extend for another year, but exercising that option will require a letter of acceptance from the vendor one month prior to expiration, an automatic alert will be sent one month prior to deadline for the letter (i.e. two months prior to expiration of contract). Another reminder alert will be sent two weeks thereafter, also copying the C.M. etc. etc. exact alerts and timing to be determined at a later date. Similarly, alerts to be set regarding milestones and other deadlines throughout the contract. Defaults can be edited by C.M. only after discussion with the department.**

**NOTE: This process specified bid throughout. It can also be the same process for an RFP except with additional alerts, tasks, back-up, etc. to accommodate vendor interview, negotiations, other extra steps, etc.**

**If a separate contract is to be developed...**

**A bid has been awarded by Commissioner’s Court and the department Contact has replied to the Contract Manager that a contract needs to be drawn up or revised. C.M. marks record as such and activates a set of additional fields related to contract management**

**C.M. notifies the Assistant County Attorney that a contract will need to be drawn up based on the awarded bid (Contact and Legal Assistant are copied).**

**Assistant County Attorney assigns contract to specific attorney to handle. One of the attorneys accesses the existing record to select:**

**Type of Contract (drop-down)**

**Attorney (drop-down)**

**Standard contract template to be customized with the soon-to-be-a-contract data**

**Ultimately the following fields of information are completed as they are the data upon which the contract is based:**

**Date of approval at Commissioner’s Court**

**Date of start of contract (execution)**

**Term of contract**

**Date of end of contract**

**Extension options/requirements**

**Legal name of awarded vendor**

**Awarded vendor contact details**

**Description of services/product**

**Required timeframes of service/delivery**

**Outputs required**

**Requirements such as licenses, credentials, insurances, etc.**

**Audit requirements (if applicable)**

**Specific milestones or results to be produced (if applicable)**

**Cancellation requirements**

**Any other departmental contacts who should be notified about contract administration developments in the future**

**Attorney draft the contract and uses all the captured data and uploaded documents to help work out contract details with Contact, using the system to create tasks and handle email communications.**

**Attorney ultimately approves final version of contract. The finalized contract is scanned into the system for record. Attorney marks the record “Approved as to Form as Submitted” or “Approved as to Form with Amendments/Modifications/Reservations Noted Below” (taken from County Legal Review Form) which activates additional contract management fields.**

**C.M. then uses the system to create a Contract Data Form displaying some of the basic contract information from above (term, important milestones, etc.). The Department Contact decides what else needs to go as back-up to the agenda item (other than Contract Data Form and the contract itself). A single file containing all agenda back-up is created and a task for Contact is made to review the back-up, upload anything additionally, and approve it. The Contract Data Form ultimately contains evidence of both Attorney and Contact approval.**

 **Contract Data Form**

**Once Contact has approved all agenda back-up and certified it as accurate and they are in agreement with contract the following fields become active and Attorney and Contact jointly determine:**

**CC date to approve contract (mini calendar)**

**Attorney creates a task for County Clerk to pick up the back-up and post on the desired CC date. Immediate alert to the County Clerk and copy C.M. No follow up reminder alerts because the timing is usually short to post the item.**

**C.M. watches for agenda posting and verifies that the item was correctly posted. If an item gets delayed, C.M. changes the CC date in the system.**

**Item goes to CC and gets approved. C.M. marks item as awarded in the system to lock all data entered to-date. Attorney becomes read-only at this point.**

**C.M. tasks Assistant with the following:**

 **Make X duplicate original copies of contract**

 **Obtain signatures from County Judge (if necessary)**

 **Obtain signatures from County Clerk (if necessary)**

**Send signed copies to vendor or dept for signature, one to be retained by vendor and the other returned to the Assistant**

**Original is attached into the system for future reference by dept and/or Attorney/C.M.**

**Original is then delivered to County Clerk for final repository**

**As tasks are completed they are checked off and final check off of acceptance by County Clerk notifies C.M. that the file is complete and the department takes over the contract management.**

**Same as bids that weren’t turned into contracts, C.M. sets Contact as a user who can upload documents and make requests only (no editing of fields). Contact manages the terms of the awarded bid and C.M. intervenes only when tasks are not being completed or there are compliance issues.**

**Alerts are set up automatically defaulted based on pre-determined set of rules. For example, if the contract is a one year contract with a single option to extend for another year, but exercising that option will require a letter of acceptance from the vendor one month prior to expiration, an automatic alert will be sent one month prior to deadline for the letter (i.e. two months prior to expiration of contract). Another reminder alert will be sent two weeks thereafter, also copying the C.M. etc. etc. exact alerts and timing to be determined at a later date. Similarly, alerts to be set regarding milestones and other deadlines throughout the contract. Defaults can be edited by C.M. only after discussion with the department.**

**NOTE: This process started with a bid. It can also be the same process for other contract types as well except that the record gets created in the Attorney’s Office by the Assistant rather than in the Purchasing Office. In those instances additional set-up fields will need to be completed:**

**Number (automatically assigned sequentially by the system)**

**Title (text entered)**

**Type of Contract (drop-down)**

**Department (drop-down)**

**Department Contact (drop-down flowdown from Department)**

**Attached back-up from Department- if any (attachment)**

**And then the Assistant County Attorney is notified by the Assistant and the process continues as detailed above.**