DECISION TREE FOR IT PROJECTS:

If This, Then That

Procurement®

INSTRUCTIONS: This document is intended to be interactive. Questions are presented with buttons you can click to reveal additional information or decisions. For best results, open this document in a PDF viewer application, such as Adobe Acrobat.

You can reset or clear out the choices you have selected at any time, using the red "Reset Choices" button at the bottom of the document.

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IT procurements can be difficult to navigate, particularly in the initial stages. How do you determine what you need? How do you decide which procurement method best suits your project, given the seemingly endless number of options? This decision tree will walk you through the initial steps in the decision process to purchase IT Hardware or IT Software, which can help you select your best course of action.

Disclaimer: This decision tree is not meant to replace your entity's existing procurement policies and procedures. Rather, it is meant to be a guideline and resource that can assist you in making the necessary decisions to choose the correct solicitation method for your needs.

SOLICITATION METHOD SELECTION: IT HARDWARE

Definitions:

EUD: End User Department
PO: Procurement Officer
CPO: Chief Procurement Officer

1. **INITIATION: Formal notification of need from EUD Purchase, per your agency's policies and procedures**

2. **READINESS:**

The Readiness process is the pre-solicitation first step that begins once the EUD inquires about an IT need. Readiness activities are used to determine if the EUD:

- Has the funds and resources to invest in their IT needs
- Can effectively maintain and secure the product or service over time
- Should buy, build, or leverage (improve) an existing IT product or service

The EUD, IT Department, and PO are all responsible for collecting and analyzing information during the Readiness process.

- EUD in collaboration with the IT Department should determine:
  - High-level system requirements
  - Data definition and use of data
  - Technical environment for the system

- The PO is responsible for:
  - Market research

    This is a critical step in the pre-solicitation process. The market research will assist the PO and EUD in determining the anticipated costs of their hardware needs and the types of hardware that may be available, whether peripherals or other Internet of Things (IOT) items. NASPO offers a number of free courses through its Procurement U Learning Management System that can familiarize POs with the basics of Market Research and also expand on the strategies for successful Market Research.

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- The PO in collaboration with the EUD should analyze:
    - Total cost of ownership

3. WHAT ARE THE SPECIFICATIONS?

A **Based on the pre-solicitation readiness process, does the EUD know what hardware they need?**

If yes, is there an option to purchase using any existing agency contracts, or are there any other Cooperative Purchasing Contracts appropriate for use?

If Yes,

If No,

If no, can the EUD conceptualize what they need with internal assistance from the IT Department (if necessary) to write their own technical specifications?

If Yes,

If No,

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B **Is there a specific platform or operating system requirement?**

If Yes,

If No,

NOTE: It is important that the supplier that is awarded a contract to develop the technical specs for the EUD not be allowed to submit a proposal to the subsequent solicitation that is based on those technical specs they created, as this would give them an unfair advantage over other suppliers in the marketplace.

C **Are there other specific requirements for the purchase, such as delivery time, warranty, location?**

If Yes,

If No,

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4. WHAT IS THE ANTICIPATED DOLLAR VALUE OR BUDGETED AMOUNT FOR THE PURCHASE?

A — **Below the agency threshold for formal solicitation process with clear technical specifications, but not a single/sole source?**

B — **Below the agency threshold for formal solicitation process with clear technical specs, and a single/sole source?**

C — **Above the agency threshold for formal solicitation process, and not a single/sole source?**

If Yes,

If No,

D — **Above the agency threshold for formal solicitation process, and a single/sole source?**

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SOLICITATION METHOD SELECTION: IT SOFTWARE

Definitions:

EUD: End User Department
PO: Procurement Officer
CPO: Chief Procurement Officer

1. **INITIATION: Formal notification of need from EUD Purchase, per your agency's policies and procedures**

2. **READINESS:**

The Readiness process is the pre-solicitation first step that begins once the EUD inquires about an IT need. Readiness activities are used to determine if the EUD:

- Has the funds and resources to invest in their IT needs
- Can effectively maintain and secure the product or service over time
- Should buy, build, or leverage (improve) an existing IT product or service

The EUD, IT Department, and PO are all responsible for collecting and analyzing information during the Readiness process.

- EUD in collaboration with the IT Department should determine:
  - High-level system requirements
  - Data definition and use of data
  - Technical environment for the system

- The PO is responsible for:
  - Market research

    This is a critical step in the pre-solicitation process. The market research will assist the PO and EUD in determining the anticipated costs of their hardware needs and the types of hardware that may be available, whether peripherals or other Internet of Things (IOT) items. NASPO offers a number of free courses through its Procurement U Learning Management System that can familiarize POs with the basics of Market Research and also expand on the strategies for successful Market Research.

- The PO in collaboration with the EUD should analyze:
  - Total cost of ownership

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3. WHAT ARE THE SPECIFICATIONS?

A **Does the EUD want a commercially available software application with no customization required?**

If yes, is there an option to use any existing agency contracts, or are there any other Cooperative Purchasing Contracts appropriate for use?

If Yes,

If No,

If no, can the EUD conceptualize what they need with internal assistance from the IT Department (if necessary) to write their own technical specifications?

If Yes,

If No,

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B **Is there a specific platform or operating system requirement?**

If yes, is it a single or sole source?

If, Yes

If No,

C **Are there other specific requirements for the purchase, such as delivery time, warranty, location?**

If Yes,

If No,

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4. WHAT IS THE ANTICIPATED DOLLAR VALUE OR BUDGETED AMOUNT FOR THE PURCHASE?

A Below the agency threshold for formal solicitation process with clear technical specifications, but not a single/sole source?

B Below the agency threshold for formal solicitation process with clear technical specs, and a single/sole source?

C Above the agency threshold for formal solicitation process, and not a single/sole source?

D Above the agency threshold for formal solicitation process, and a single/sole source?

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