

# Best Practices for IT Purchases

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# Presenters

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Computer hardware and peripherals



# Using Chat...



# Starting the IT Process



# Determine the Type of Purchase

## Software

- Software license review may be needed

## Cloud Services

- Cloud brokerage may be required

## IT Hardware

- Determine equipment needs

## IT Professional Services

- Contractors propose candidates via a Request for Service process



# Enterprise Contracts

Search for existing contracts:

- Search [VendorNet](#) for any mandatory enterprise contracts
- If none exist or meet the need, search VendorNet for optional enterprise contracts.



The screenshot shows the VendorNet website's search interface. At the top, there is a navigation menu with links for VendorNet, Registration, Bids, Contracts, NIGP Codes, Forms, General Procurement, FAQ, Contact Us, and Login. Below the navigation is a section titled "Search Contracts" containing four input fields: "Keyword or Number", "Agency", "NIGP", and "Supplier". At the bottom of the search area, there are four radio button options: "Piggyback" (Yes, No, Both), "Cooperative Purchase" (Yes, No, Both), "Mandatory Purchase" (Yes, No, Both), and "PCard" (Yes, No, Both). The "Both" option is selected for all four categories.



# Business Case Exception

If a mandatory contract exists for the desired commodity/service, that contract must be used unless there is Business Case Exception(BCE) to purchase elsewhere.

Sample BCE justifications include:

- Better pricing
- Contractor is unable to provide the service in remote areas
- Compatibility

In cases of uncertainty, contact the Contract Manager to learn what information is required for the BCE request.

*Guide to Submitting Business Case Exceptions eLearning*  
Coming Soon!



# Alternative Procurement Authorities

## Competitive Procurements

- Collaborative Contracting, [PRO-502](#)
  - Piggybacking
  - Collective purchase contracts
    - Examples include WI municipalities, NASPO, E&I, Big Ten Academic Alliance
  - [Collaborative Contract Visual Guide](#)
- Simplified Bidding, [PRO-303](#)
- Request for Bid/Proposal, [PRO-304](#) through [PRO-309](#)

## Non-Competitive Procurements

- Best Judgement, [PRO-302](#)
- Sole Source Waiver, [PRO-501](#)
  - Internal vs. Governor's waiver

## Procurement Manual Sections

- [300-Series: Competitive Solicitations](#)
- [500-Series: Exceptions, Waivers & Special Handling](#)

Procurement Authority eLearning's are available in Cornerstone





# Use Chat or Unmute Your Mic...

**The use of collaborative contracts can be a great benefit for agencies and campuses.**

**However, the terminology and the processes can be confusing.**

**Which are the most challenging for you?**



# Software



# Software Contracts

- NASPO Software VAR Contract: [505ENT-M23-NASPOSVAR-00](#)
- CDW Government: 505ENT-M23-NASPOSVAR-01
- Insight Public Sector: 505ENT-M23-NASPOSVAR-02
- SHI International: 505ENT-M23-NASPOSVAR-03
- Zones, Inc: 505ENT-M23-NASPOSVAR-04



# Software Best Practices

- Get quotes from multiple vendors, if possible (Request for Service)
- If a quote is given, ensure that none of the terms and conditions conflict with the master agreement
- Build in time to review and negotiate software agreements
- Attach quotes to purchase orders when finalized

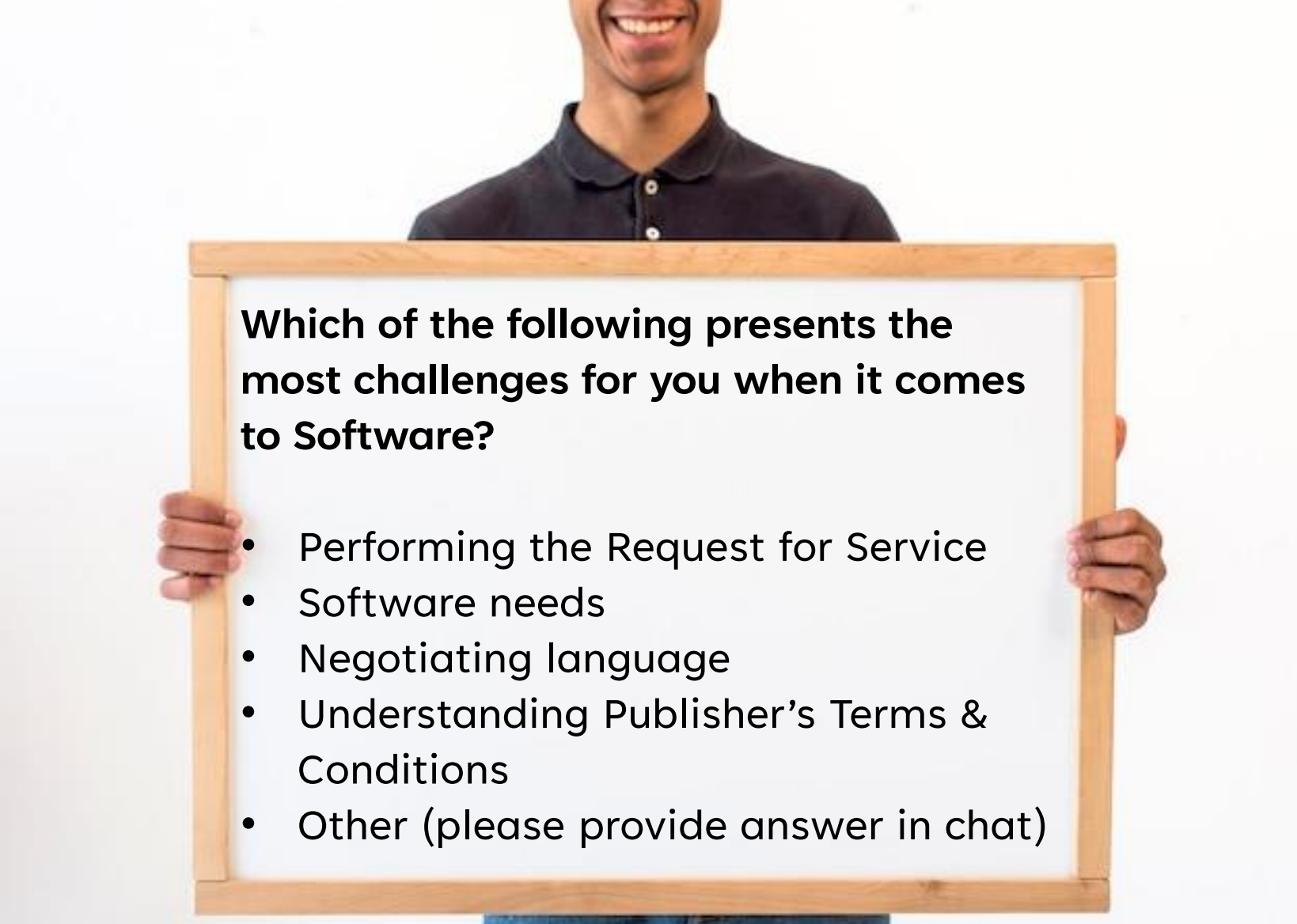
# Software Best Practices

## Software Issues to consider:

- Data Ownership
- Additional Terms
- Audit
- Viruses, Disabling Devices and Illicit Code
- Infringement Indemnification



# Polling Question ...



**Which of the following presents the most challenges for you when it comes to Software?**

- Performing the Request for Service
- Software needs
- Negotiating language
- Understanding Publisher's Terms & Conditions
- Other (please provide answer in chat)

# Cloud Solutions / Software



# Cloud Solutions / Software Contracts

## NASPO Cloud Solutions Contract

- [505ENT-018-NASPOCLOUD-00](#)

## Carahsoft

- [505ENT-018-NASPOCLOUD-01](#)

## VMware

- [505ENT-018-NASPOCLOUD-02](#)

## Unisys

- [505ENT-018-NASPOCLOUD-03](#)





# Cloud Solutions / Software Best Practices

Cloud Software Issues to Consider:

- Data Protection
- Data Location
- Security Incident or Data Breach Notification



# Polling Question...

## Which of the following is most difficult for you for Cloud Solutions?

- Finding the best solution
- Performing the Request for Service
- Determining what information is stored on the Cloud
- Project Milestones
- Backup Recovery Systems
- Data Security
- Other (please provide answer in chat)

# IT Hardware



# IT Hardware Mandatory Contracts

- Computer Equipment and Related Supplies
  - [505ENT-M22-WICOMPUTER-00](#)
- Copiers, Printers, and Related Devices
  - [505ENT-M25-MFDCOPIER-00](#)
- Audio Video Conference Room Equipment and Related Services
  - [505ENT-M23-AUDIOVIDEO-00](#)



# Computer Equipment and Related Supplies

- Mandatory use contract for State agencies excluding UW campuses, but purchasing peripherals is optional for all.
- Includes standard configurations, developed by a group of State agencies to meet department needs.
- Optional computer equipment contracts are available:
  - NASPO Computer Equipment, Peripherals and Related Services
  - Apple Brand Equipment, Accessories and Related Products and Services



# Copiers, Printers and Related Devices

- Mandatory use contract for all State Agencies
- Purchasing considerations: lease, rent or buy device, maintenance agreement
- Documents to save: lease and maintenance agreement, itemized quote
- Encouraged PO verbiage: serial #, invoice address (if different than PO), specify timeframe of lease period (e.g., year 2 of 5)



# Copiers, Printers and Related Devices, cont.

Mandatory PO verbiage:

- a) “PO is subject to NASPO Contract # \_\_ and State of Wisconsin PA #\_\_
- b) Ordering contact name, address and phone number
- c) Purchase order amount
- d) Type of lease or rental and monthly payment
- e) Maintenance agreement with cost per copy rates
- f) Itemized list of accessories
- g) Type of service program and rates
- h) Attach any supplemental documents



# Audio Video Conference Room Equipment and Related Services

- Mandatory use if installation is included
- Installation projects may require extensive planning
  - Include time for background checks for contractors.
- Project responsibilities and deliverables should be established prior to executing an agreement
  - An optional SOW template is available on the VendorNet contract page
  - Build in time to review contractor documents

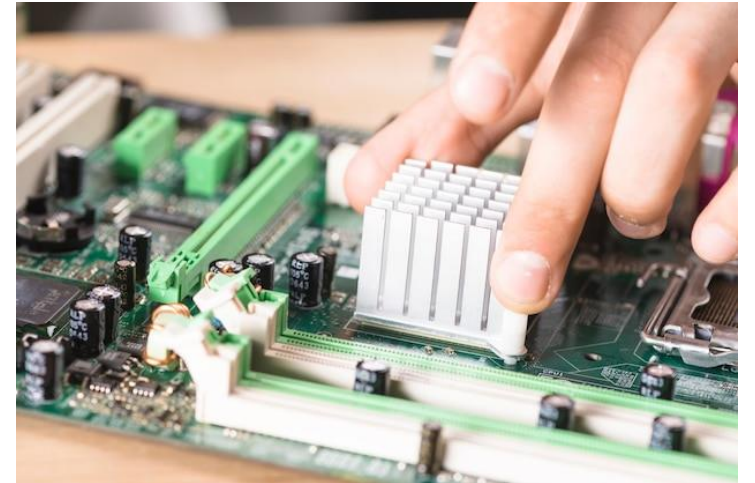




# IT Hardware Best Practices

IT Hardware issues to consider:

- Maintenance
- Acceptance Language
- Training
- Hard Drive Removal
- End of Life – Equipment Disposal



# Polling Question...

What is the biggest challenge you face when it comes to IT hardware?

- Determining equipment needs
- Finding devices on-contract
- Training team on using the hardware
- Maintenance
- Warranty Coverage
- Equipment disposal
- Other (please provide answer in chat)



# IT Services Best Practices



# IT Staff Augmentation Services Mandatory Contract

- Hourly Based IT Staff Aug Services - [505ENT-M21-SERVICESIT-01](#)
  - Select Job Title from Rate Card
  - Complete a modified RFB process (Request for Service)
  - Hiring Manager interviews candidates
  - Submit any additional required forms once a candidate is selected
  - Start Engagement with contractor
  - For Agencies utilizing STAR for contractor time entry, confirm hours when approving, if not approved reach out to VMS company immediately



# IT Staff Augmentation, cont.

## PO Verbiage:

1. State contract number
  2. Hiring Manager
  3. Supplier Company Name
  4. Contracted Personnel Name
  5. Job Title & Hourly Rate
  6. Engagement hours
  7. Engagements start and end date
- Purchase Order and contract dates should only run through 6/30/XXXX, unless any other agency-specific rules apply
  - New Purchase Orders must be generated for each fiscal year, or according to agency-specific rules
  - Blanket PO's (multiple contractor's) must include a separate sheet with information from items 1-4



# Using Chat or Unmute Your Mic...

**What is the biggest challenge you see when using the IT staff augmentation contract?**

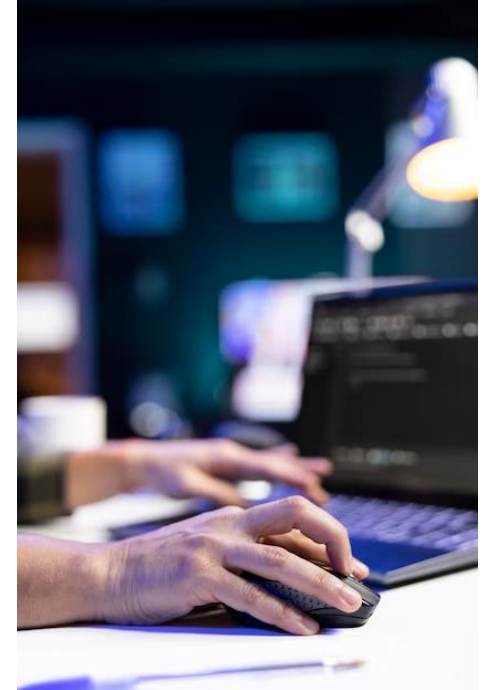
- Understanding what the contract allows
- Determining Job Title
- When to do a CBA/CA
- Other (please provide answer in chat)

# Additional Steps



# Cloud Brokerage Review (CBR)

- A CBR is a comprehensive evaluation of a Cloud Solution that weights security risks and measures compatibility to existing state network.
- Best Practice is for agencies and vendors to go through the CBR process.
- For DET Supported Agencies CBR must be performed before any written agreement can be executed with a vendor.





# Large, High Risk IT Process

Documents to include:

- High-Risk IT Form ([DOA-3730](#))
- Contract
- Vendor quote
- Original RFB/RFP or a Waiver Case Letter

For Sample Standard Language:

[Procurement Information Memo 22001](#)

*Navigating Large, High-Risk IT Projects Contracts* eLearning  
Available on Cornerstone



# Polling Question ...

## What challenges are you facing with the Additional IT Specific Steps?

- Building in enough time
- Understanding the CBR Process
- Understanding the Large, High-Risk IT Process
- Knowing when to apply the Additional IT Processes
- Other (please provide answer in chat)

# Additional Training in Cornerstone

## Procurement Best Practices

- Procurement 101: Introduction for All Employees eLearning
- What is Simplified Bidding eLearning
- Practical Guidance: Submitting Waivers eLearning
- Practical Guide to Collaborative Contracting in the State of Wisconsin eLearning
- Writing and Conducting RFB
- Writing and Conducting RFP
- Guide to Submitting Business Case Exceptions
  - Coming Soon!

## IT Best Practices eLearning Series

- Navigating IT Hardware Purchases eLearning
- Navigating IT Software Purchases eLearning
- Navigating Large, High-Risk IT Project Contracts eLearning
- IT Software Contracts: Key Language eLearning
- Cloud Software Contracts: Sample Language eLearning
- Cloud Brokerage: Sample Terms & Language eLearning
- IT Hardware Contracts: Key Language eLearning
- An Overview of IT Purchases eLearning



# Interested in More Information?

## Helpful Links:

- [Cloud Brokerage Agency and Vendor Forms](#)
- [VendorNet](#)
- [Procurement Request Portal](#)
- [State of Wisconsin Procurement Manual](#)
- [Wisconsin Legislature: Chapter 16](#)



# Questions



# Questions

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# Thank you!

