Best Practices for IT Purchases

November 12, 2025

Conference speakers

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Software, DET Solicitations and IT Research and Advisory Services

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Computer hardware and peripherals

Using the Chat...

What knowledge are you hoping to walk away with today?

IT Staff Augmentation

Laura Bergum

IT Staff Aug.- Common Questions

What kind of information do I need to have for my Request for Service (RFS)?

- Job Title
- Max Bill Rate: $/hour
- Top Required Skills & Nice to Have Skills
- Years of Experience
- Interview Process
- Engagement Location
- Project details
- Job description document that can be attach to the posting

IT Staff Aug. - Continued

1. I conducted my RFS and received an exceptional number of resumes. I am limited on time and do not have the capacity to review 115 applicants. What can I do?

2. The resumes I received from a posting appear to be created using AI. Is AI used to review resume submission?

IT Staff Aug.- Continued

1. I've conducted a successful Request for Service (RFS). Do I need to provide rejection reasons for all other candidates?

2. When do I complete and submit the Cost Benefit Analysis (CBA)?

3. I would like to have a background check done on a candidate. Can the vendor provide one?

IT Staff Aug.- Continued

What needs to be included in the Purchase Order (PO)?

- State Contract Number (505ENT-M21-SERVICESIT-01)
- Hiring Manager
- Supplier Company Name
- Contracted Personnel Name
- Job Title
- Hourly Rate
- Hours on PO
- Start Date /End Date

IT Staff Aug. – Continued

1. I have conducted an RFS and have not found any viable candidates to fit the requirements. Company X can perform this service and at a fraction of the estimated cost for a contracted personnel through the mandatory contract. How can I get Company X to perform this work outside of the mandatory contract?

2. We have had a contracted personnel engaged for a short time, but the quality of their work has declined, or they are refusing to appear on camera. The behavior seems suspicious; we are concerned about the integrity or security of our project, what do we do?

Questions?
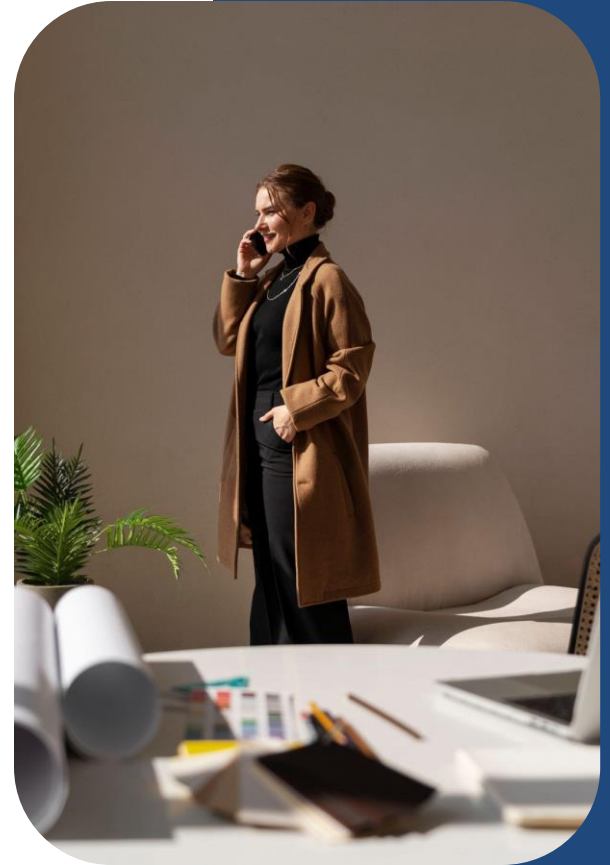
Software Purchases

Susanne Matschull

Software Purchases

Two general contracts are available: Software Value Added Reseller (SVAR) Contract and the Cloud Solutions Contract

- Are there implementation services?
- Will the software be on premise or hosted?
- Will your department need to customize the software?

Request for Quote (RFQ) Email Sample for Identified Software

"I wanted to reach out to you to see if your company can provide Granicus/GovDelivery software through the Software VAR Reseller contract, 505ENT-M23-NASPOSVAR-00.

If you have any questions, please let me know. Please respond by November 20th.
Thank you."

RFQ Email Sample for Unidentified Software

"I am requesting a quote for software to streamline policy, compliance, risk management, auditing, incident management, and vendor oversight processes. It must meet the following requirements:

- Manage state agencies authorization of information systems. Document the granting of authorizations including Authority to Operate (ATO) and Authority to Use (ATU), by agency's Authorizing Official (AO) as they accept the risk of operations of assessed systems.
- Address internationally recognized security controls:
  - NIST, ISO, PCI-DSS, CJIS, HIPAA, CIS, FISMA, among others
- Support federal legislation and state statutes:
  - IRS-Publication 1075, CMS ARC-AMPE, SSA, FBI, FERPA, FEDRamp, among others
  - [Subchapter VII (Wis. Stats. 16.97 to 16.979)](#)
  - [Subchapter IX (Wis. Stats. 16.99 to 16.998)](#)

Please respond by November 20th."

Software Procurements: Questions for Program Area

- What do you need the software to do?
- What data will be stored on the software and how will it be used?
- How many people will need access?
- How many licenses?
- Are there any programs or applications it will need to be compatible with?

Software Procurements: Questions for Program Area

- Have they reached out to any of the contract vendors to provide the service?
- Have they done market research to see what is available?
- Have they spoken with any vendors?
- Are there any risk factors we need to be aware of?

Software Procurements: Questions for Program Area

- Is there a cost estimate and/or have they received any quotes?
- Cost Structure – will it be an annual license fee, is it perpetual software (one time cost with annual maintenance), are you paying for certain modules?
- Implementation Costs – how would they like them structured (hourly, first year costs, etc.)?

Compliance Matrices Examples

Appendix A Section	Description	Compliance	
		Yes	No
2	**FUTURE SYSTEM REQUIREMENTS**		
2.1	**Technical Requirements**		
2.1.a	Provided software solution must integrate with WTCS' current software environment:		
2.1.a.i	Must be developed using Java (JDK 11 or higher).		
2.1.a.ii	Must be a web-based Java application.		
2.1.a.iii	Must be SQL Server 2022.		
2.1.a.iv	Must be deployable on Docker Desktop (for in-house, local development).		
2.1.a.v	Must be deployable on a Kubernetes cluster (microk8s) (for higher-environments).		
2.1.a.vi	Must integrate with existing single-sign-on (Keycloak) used by WTCS portal application.		

Compliance Matrices Examples

| #	Solution Characteristics		Proposer Response		Additional Comments
#	**Requirement**	**Mandatory**	Yes	No	
	General Characteristics				
1	Scalability to accommodate all agencies.	M			
2	Flexibility to adapt to various frameworks and allow customization to meet unique business needs.	M			
3	Integration Capabilities that provide seamless integration with existing systems.				
4	User-friendly interface offering easy navigation for by users with different technical skills.	M			

Compliance Matrices Examples

	Worksheet	Response Count	
		Yes	No
1	Current Functional Specifications	0	0
2	Future Functional Specifications	0	0
	Total	0	0

Questions for Software Vendors

- Is there AI being used in your software, and if so, can it be turned off?
- Where is the data being stored?
- Do they have any plans to use our data?
- Does this quote have all the fees necessary for implementation and operation of services?
- Will your software be used for a website, and does it meet accessibility requirements?

Questions?
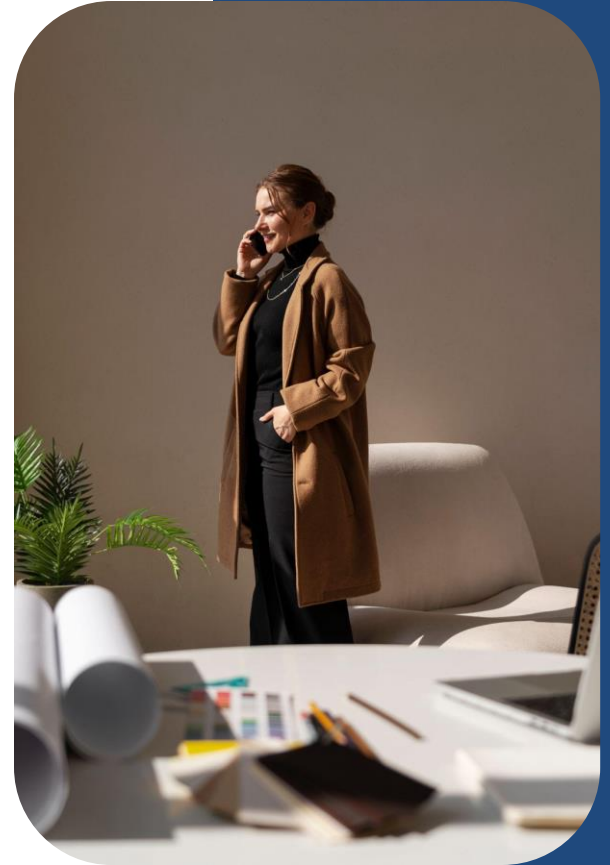
IT Hardware

Hallee Kox

Working in Tandem with IT

- Determine if you're a DOA/DET supported agency
  - Division of Enterprise Technology (DET) has standardized their hardware (e.g., laptop, desktops, peripherals, mobile devices, VoIP equipment).
  - Agencies are required to purchase standardized hardware unless they receive a BCE from DET.
  - DET will not asset tag devices that were not approved by them.
  - An asset tag number is required for help desk assistance.

- If you're not a DOA/DET supported agency, work with your IT department to determine their standards.

DET/DOA Supported Agencies

- BOALTC (Board on Aging and Long-Term Care)
- BCPL (Board of Commissioners of Public Lands)
- BPDD (Board for People with Developmental Disabilities)
- CANPB (Child Abuse and Neglect Prevention Board)
- DOA (Department of Administration)
- DSPS (Department of Safety & Professional Services)
- Ethics (Ethics Commission)
- Gov (Office of the Governor)
- HEAB (Higher Education Aids Board)
- KRM (Kickapoo Reserve Management Board)
- Lt Gov (Office of Lieutenant Governor)

- LWR (Lower Wisconsin State Riverway Board)
- OCI (Office of the Commissioner of Insurance)
- OST (Office of the State Treasurer)
- SOS (Secretary of State)
- TAC (Tax Appeals Commission)
- Tourism (Department of Tourism)
- WAB (Wisconsin Arts Board)
- WEC (Wisconsin Elections Commission)
- WERC (Wisconsin Employment Relations Commission)
- WHS (Wisconsin Historical Society)
- WWC (Wisconsin Women's Council)

Where Can I View Prices?

- It's going to vary by contract and contractor.

- For contract # 505ENT-M22-WICOMPUTER-00, the links to the contractor's website are provided in the "*Ordering Products by Contractor*" document on VendorNet.

- You can either shop on their site, or request quotes via email/call.

This is all with a caveat that you should be working with your IT department!
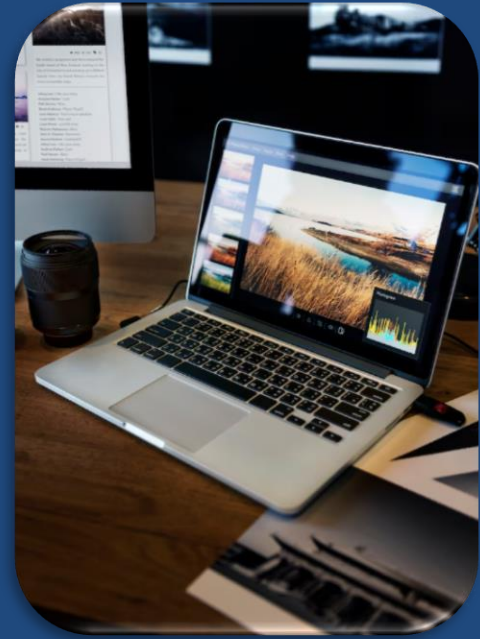
Commercial vs. Consumer Devices

- Manufacturers sell **consumer devices** to commercial retailers (Best Buy, Walmart, etc..) and **commercial devices** to IT distributors (D&H Distributing, TD Synnex, etc..).

- **Consumer devices are cheaper than commercial devices because they are built differently and are not the same product.** Commercial devices are built for heavy usage. Commercial devices have better warranties and are made from better quality materials.

- **Consumer products aren't built identically**. Even though the specs are the same, the brand of the hard drive and the brand of the memory in the devices might be different. This is problematic with imaging devices.

Product and Service Schedule (PSS)

- Contractors are required to provide a complete listing of all products and services offered under the Computer Equipment and Peripherals National Association of State Procurement Officials (NASPO) Master Agreement (MA).

- Contractors update their PSS throughout the contract term.

- WI utilizes this Master Agreement via Participating Addendum # 505ENT-O24-NASPOCOMPUT-00.

Product and Service Schedule (PSS)

Can also use this as a tool to search product offerings and list prices for devices under M contract

Price
- The PSS contains the list price and NASPO contract price.
- Ensure you are receiving the correct price.

Third Party Products
- The PSS contains a list of third-party products, so you can search for products that are not manufacture specific.

Product and Service Schedule (PSS)

The links to find the PSS by manufacturer are provided on [VendorNet](#) under the NASPO Computer Equipment and Related Services contract number: [505ENT-O24-NASPOCOMPUT-00](#).

Open Market Items

- The copiers, printers and scanners contract [505ENT-M25-MFDCOPIER-00](#) was amended to include open market items.

- This means that the contractors are offering products that span beyond what's included in their NASPO price list as long as it's:
    - Within the scope of the contract, and…
    - Has a minimum 15% discount off the Manufacturer's Suggested Retail Price (MSRP).

- Additional documentation is needed to receive a Business Case Exception (BCE).
    - For items not included in the MA price list, please request a quote from the contractors to see if they can offer the device, or an equivalent, at a 15% discount off MSRP.

Email Template For New Device

"The AGENCY NAME is requesting quotes for a DEVICE NAME AND INSERT LINK WITH SPECS IF POSSIBLE. Since this is considered a DEVICE TYPE, I am including all vendors who were awarded GROUP LETTER AND GROUP TITLE.

Questions:

1. Can you provide this solution under contract 505ENT-M25-MFDCOPIER-00 via the open market amendment; or
2. Can you please provide an equivalent solution for consideration?

Please provide your response by **DATE (providing a minimum of five business days is recommended)**. If more time or information is needed to answer these questions, please let me know."

EMAIL SAMPLE FOR NEW DEVICE

"The Department of Administration is requesting quotes for a Bambu Lab H2D Pro. Since this is considered a 3D printer, I am including all vendors who were awarded Sub-Group D-1 Specialty Printers.

Questions:

1. Can you provide this solution under contract 505ENT-M25-MFDCOPIER-00 via the open market amendment; or
2. Can you please provide an equivalent solution for consideration?

Please provide your response by **Thursday, November 20th**. If more time or information is needed to answer these questions, please let me know."

EMAIL TEMPLATE FOR REPLACEMENT DEVICE

"The AGENCY NAME is replacing their CURRENT DEVICE NAME AND INSERT LINK WITH SPECS IF POSSIBLE. Since this is considered a DEVICE TYPE, I am including all vendors who were awarded GROUP LETTER AND GROUP TITLE.

Solutions that they are currently finding are:
- NEW DEVICE NAME AND INSERT LINK WITH SPECS IF POSSIBLE
- NEW DEVICE NAME AND INSERT LINK WITH SPECS IF POSSIBLE

Questions:
1. Can you provide either of these solutions under contract 505ENT-M25-MFDCOPIER-00 via the open market amendment; or
2. Can you please provide an equivalent solution?

Please provide your response by DATE. If more time or information is needed to answer these questions, please let me know."

Tying Concepts Together

What Would You Do?

You request a quote for a specific printer, and this is what you receive. What (if anything) would you do?

			Price		
1	HP Officejet Pro 9110b Printer - color - Duplex - ink-jet - A4/Legal - 1200 x 1200 dpi - up to 22 ppm (mono) / up to 18 ppm (color) - capacity: 250 sheets - USB 2.0, USB 2.0 host, LAN, Wi-Fi(ac), Bluetooth 5.0 LE - cement	5A0S1A#B1H	1	$177.12	$177.12

Subtotal: $177.12
Tax (.0000%): $0.00
Shipping: $0.00
Total: $177.12

WI - STATE OF WISCONSIN (NVP PC5) [505ENT-O24-NASPOCOMPUT-01]

What Would You Do?

This quote:

- Doesn't include list price.
    - Check the PSS to confirm list price.

- Is not referencing the mandatory printer contract.
    - This was not included on the itemized list in the printer contract.
    - Use the list price from the PSS to confirm you are receiving the open market discount.

Items to Include in Inquiries

- Contract ID including last two digits.
- Email string with vendor.
- Quote, sub agreement, PO.
- Full context.
- What outcome are you looking for?

Questions?

Additional Trainings in Cornerstone:
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:**
  - <u>VendorNet</u>
  - <u>Procurement Request Portal</u>
  - <u>State of Wisconsin Procurement Manual</u>
  - <u>Wisconsin Legislature: Chapter 16</u>

Conference speakers

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Software and hardware for highly complex mainframe, server and operational systems

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Questions?

November 12, 2025: 12:30 – 4:00 pm

12:30 – 1:30 pm	**General Session**	Welcome, State of State Procurement – Cheryl Edgington & Becky Hoefs, State Bureau of Procurement
1:30 – 1:45 pm	Break	

	Workshop A	Workshop B	Workshop C
Breakout Session 1 1:45 – 2:45 pm	IT Best Practices	Understanding Grants and Other Exemptions	STAR Procurement in Progress: Enhancements, Insights, and What's Next
2:45 – 3:00 pm	Break		
Breakout Session 2 3:00 – 4:00 pm	Get to Know the IT Team	Get to Know the Enterprise Sourcing Team	Purchasing Best Practices with CAPS

THANK YOU!

IT Best Practices

2025 SBOP Procurement Conference!