



Routine/small technology purchases



Large I.T. Projects



Small text box containing additional notes or details related to the Large I.T. Projects process.

Third Party Enterprise Software Evaluation

Large I.T. Projects may benefit from third party evaluation by consultants specializing in software evaluation and selection. Benefits are reduction of faulty purchasing decisions that might otherwise be caused by sales tactics, internal issues, strong personalities and groupthink.



Bottom line, your functional needs become your requirements, and your requirements are what is expected of the vendor. Pricing failed compliance with these specifications is your only recourse, should there be a dispute. Or, what recourse you may have is to hold the vendor to a standard that isn't what you care about.

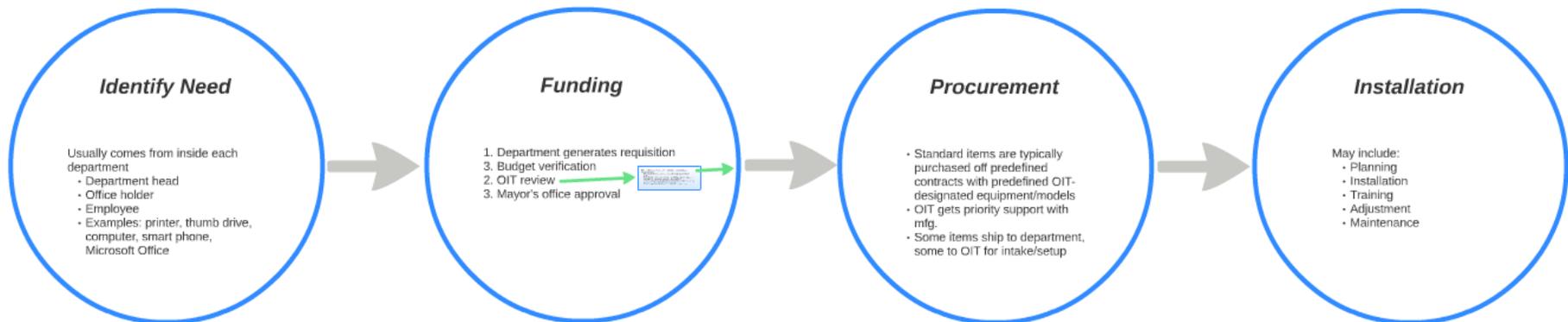
History of software acquisition and maintenance
 - Historical system (TMS/Gen/Quest/CEP/CI)





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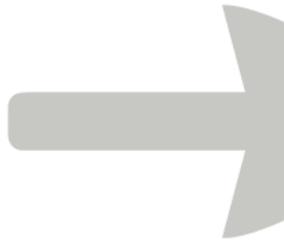
Routine/small technology purchases



Identify Need

Usually comes from inside each department

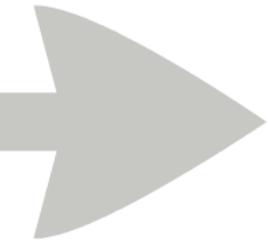
- Department head
- Office holder
- Employee
- Examples: printer, thumb drive, computer, smart phone, Microsoft Office



Funding

1. Department generates requisition
3. Budget verification
2. OIT review
3. Mayor's office approval

Mayor's office asks OIT to review all technology related purchases
Review consists of:
- Other alternatives that prevent the need for the purchase? (Virtual servers)
- Consistency: Is it consistent with other technologies already in place, is it consistent with County and Industry IT best practices?
- Also reports back on process and procedures that need to be made? (i.e. training for the user, upgrade of a system to accommodate, etc.)
- Are there other costs or issues that have not been considered?



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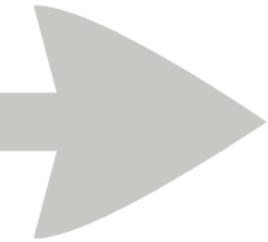
Review consists of:

- **Other alternatives** that prevent the need for the purchase? (virtual servers)
- **Consistency**: is it consistent with other technologies already in place, is it consistent with County and industry I.T. best practices?
- Are there post-purchase **preparations** that need to be made? (i.e. training for the user, upgrade of a system to accommodate, etc.)
- Are there **other costs or issues** that have not been considered?

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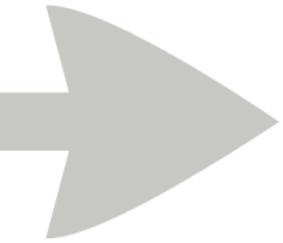
Procurement

- Standard items are typically purchased off predefined contracts with predefined OIT-designated equipment/models
- OIT gets priority support with mfg.
- Some items ship to department, some to OIT for intake/setup

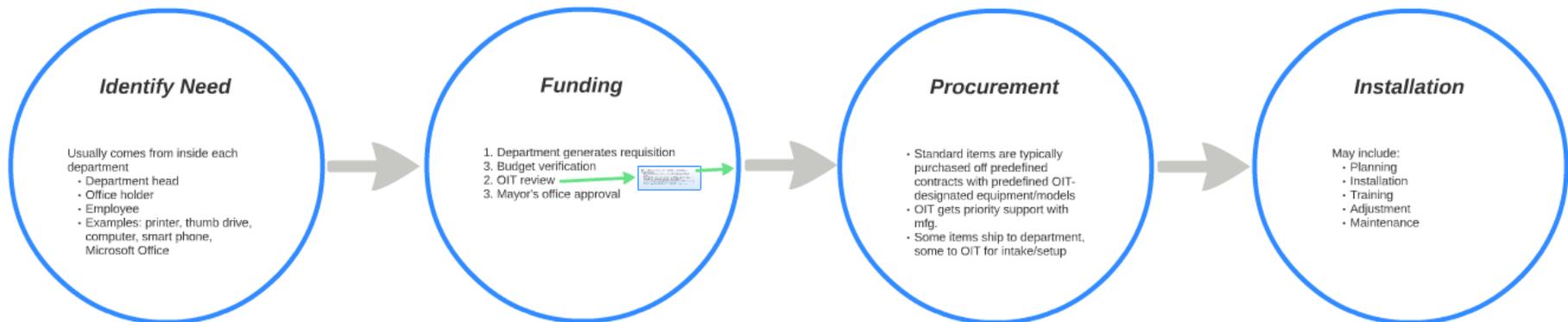
Installation

May include:

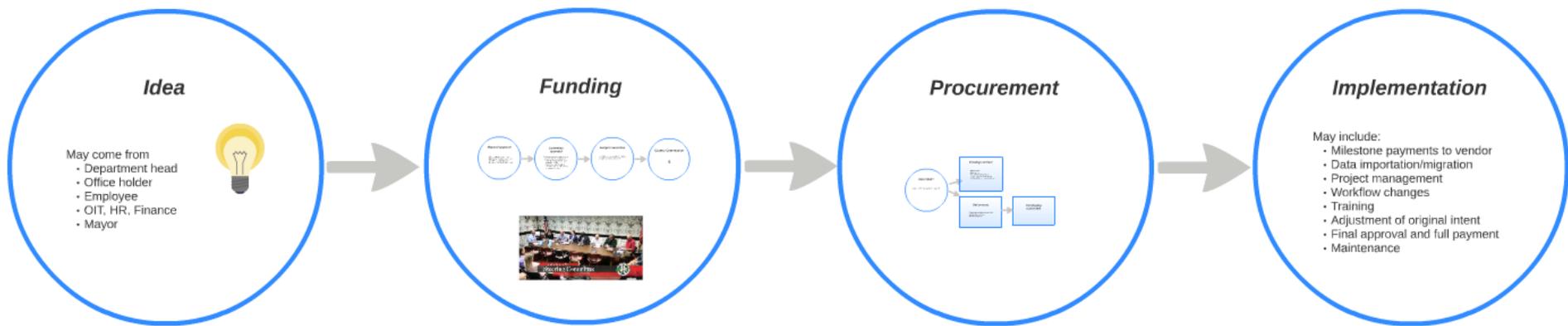
- Planning
- Installation
- Training
- Adjustment
- Maintenance



Routine/small technology purchases



Large I.T. Projects



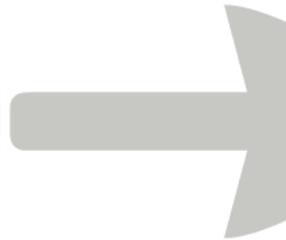
Software Management Escalation options

1. All software requests must be reviewed and submitted by the Mayor and Office of Information Technology prior to proceeding.
2. If a request requires Mayor/OIT approval then go before the direct report committee. An implementation timeline is to be established at this time. A schedule for repeat committee reports may be established at this time. If the department does not receive approval they should use the Requesting Committee.
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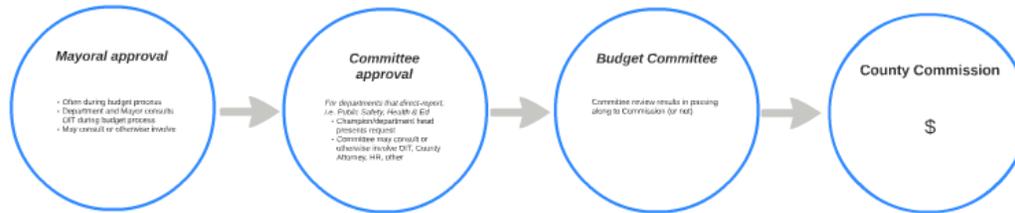
Idea

May come from

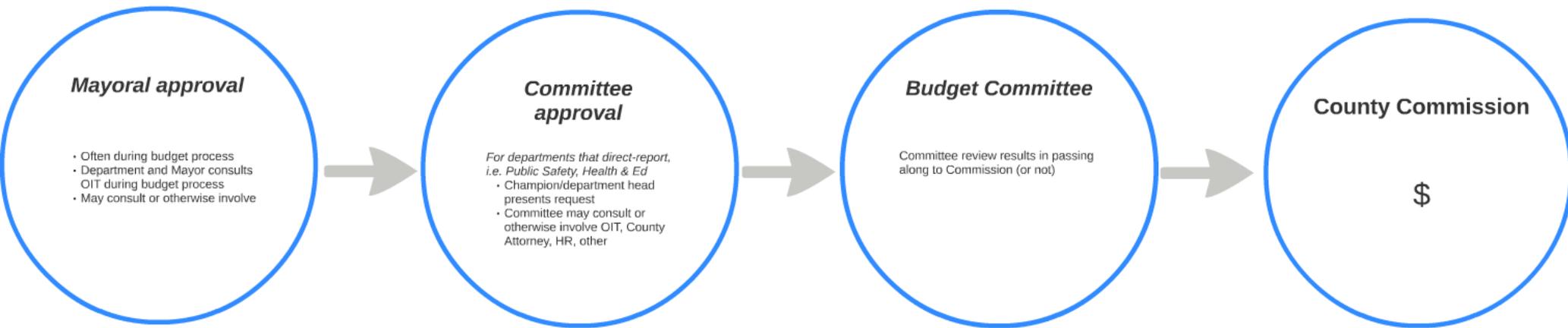
- Department head
- Office holder
- Employee
- OIT, HR, Finance
- Mayor



Funding

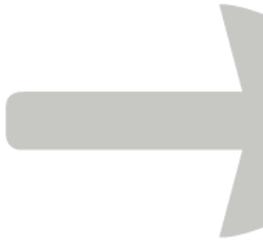


Funding



Mayoral approval

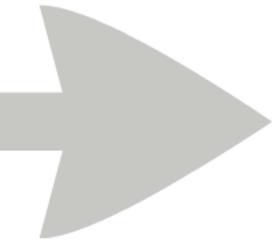
- Often during budget process
- Department and Mayor consults OIT during budget process
- May consult or otherwise involve



Committee approval

*For departments that direct-report,
i.e. Public Safety, Health & Ed*

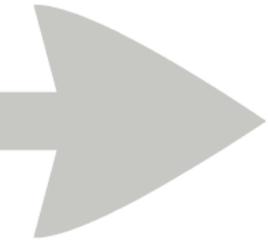
- Champion/department head presents request
- Committee may consult or otherwise involve OIT, County Attorney, HR, other

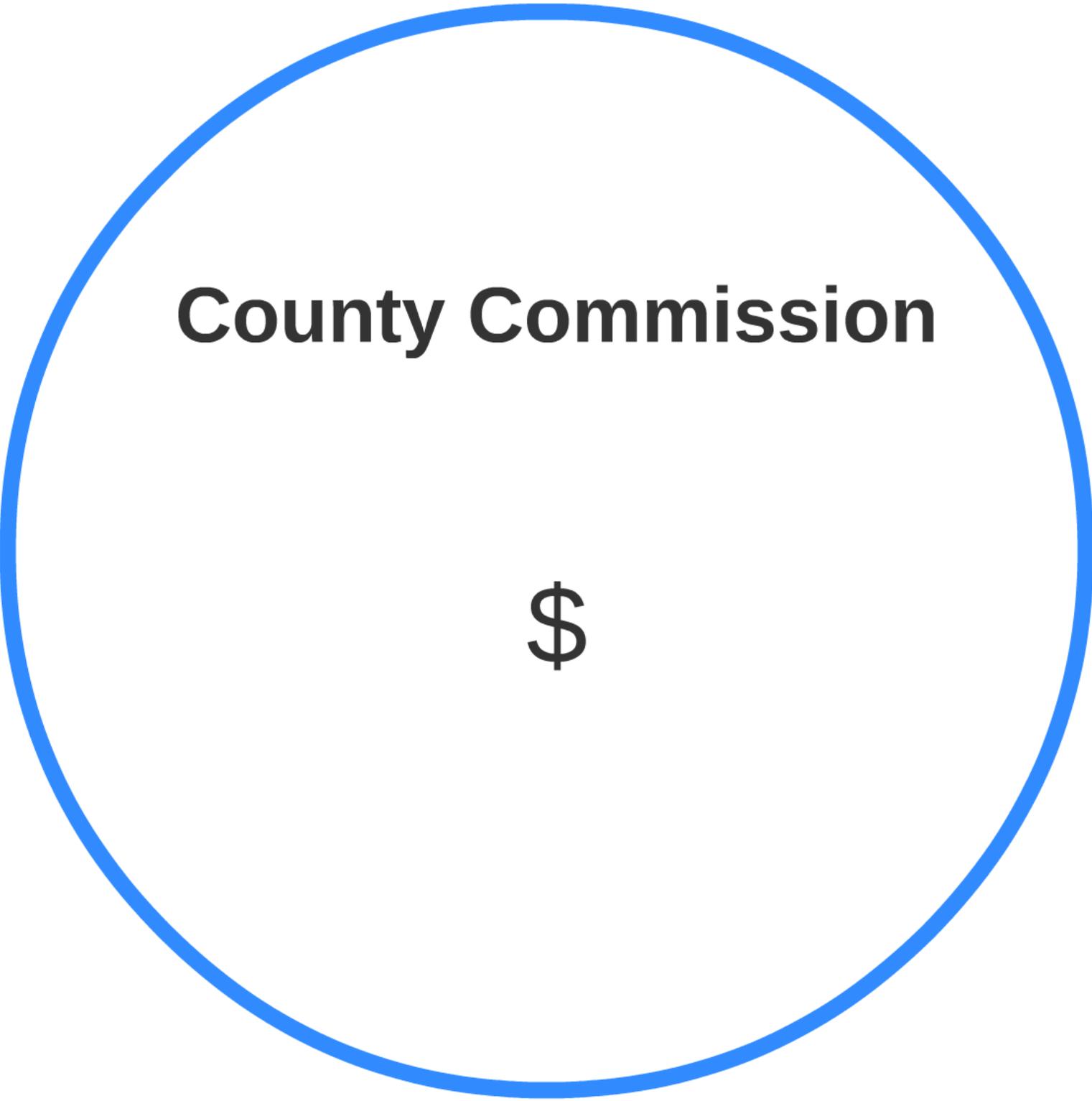




Budget Committee

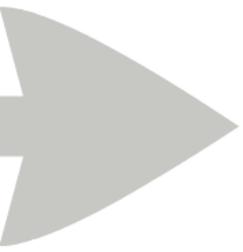
Committee review results in passing
along to Commission (or not)



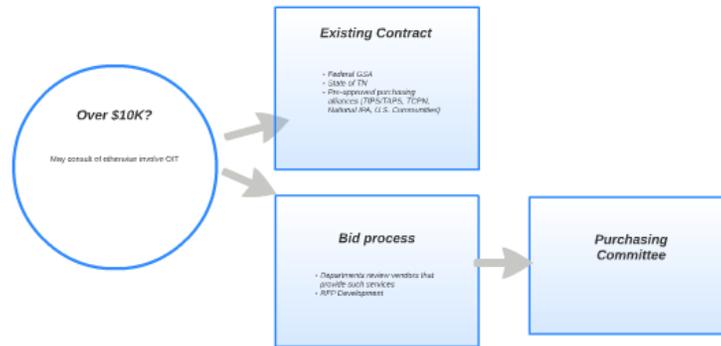


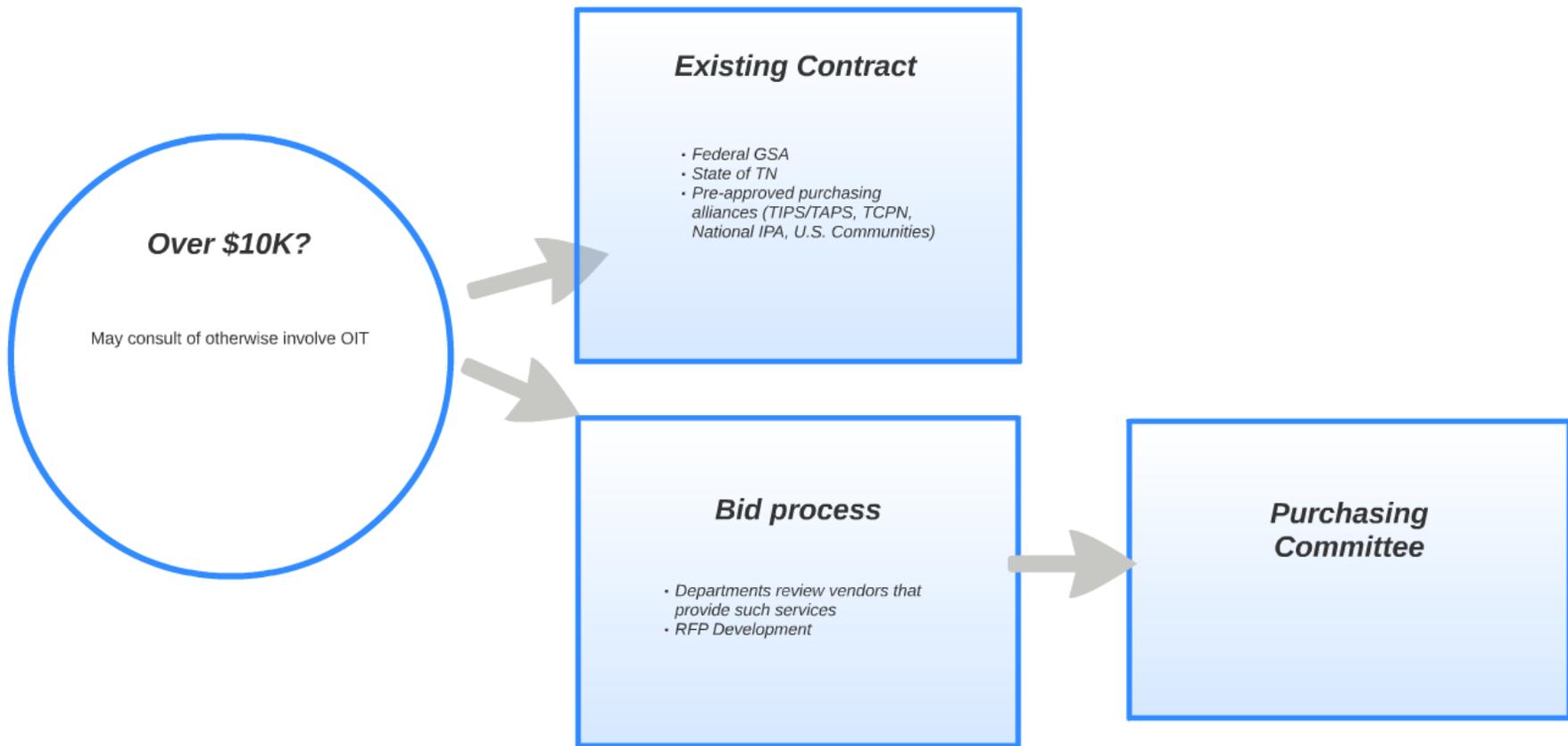
County Commission

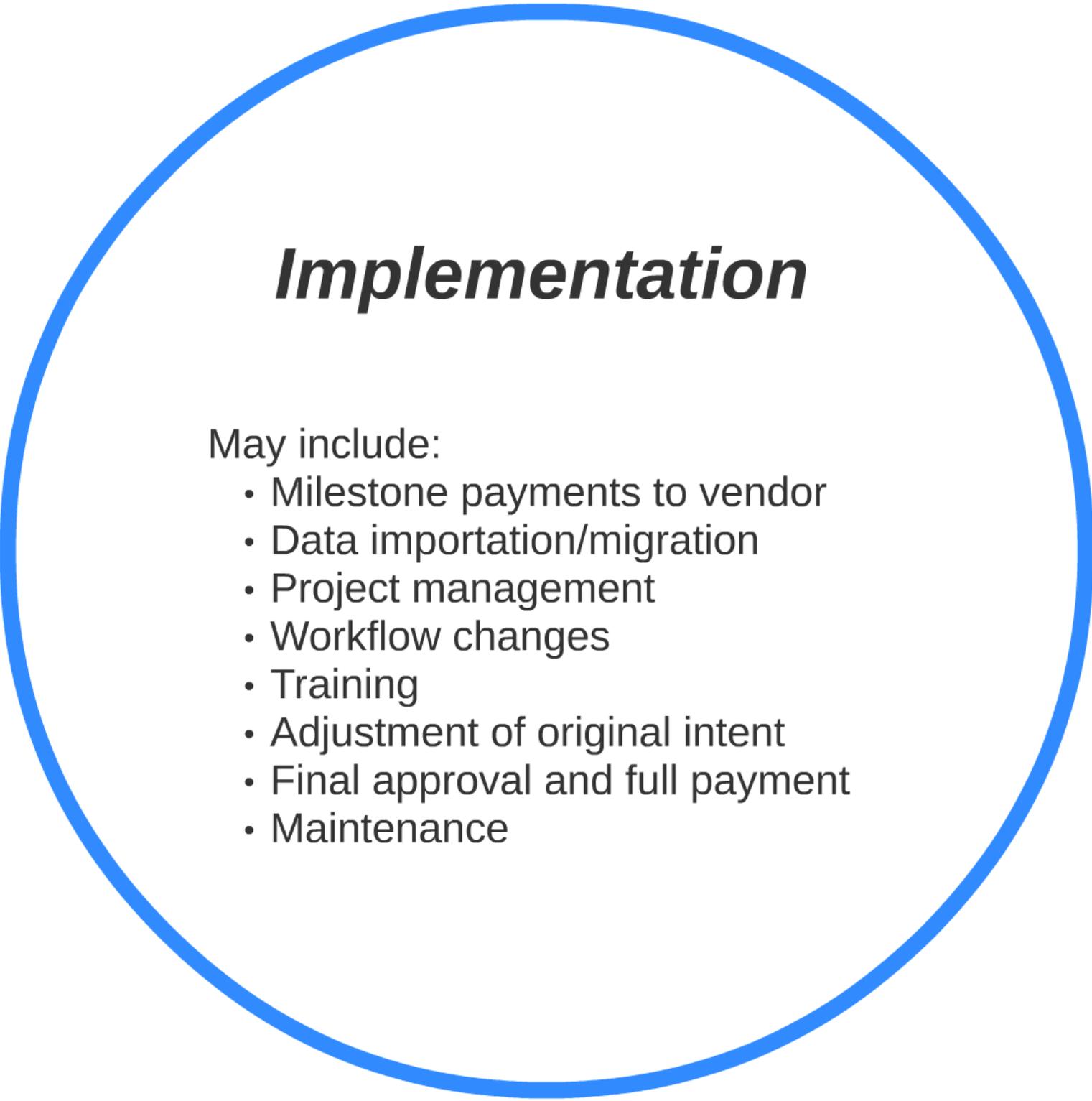
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Procurement





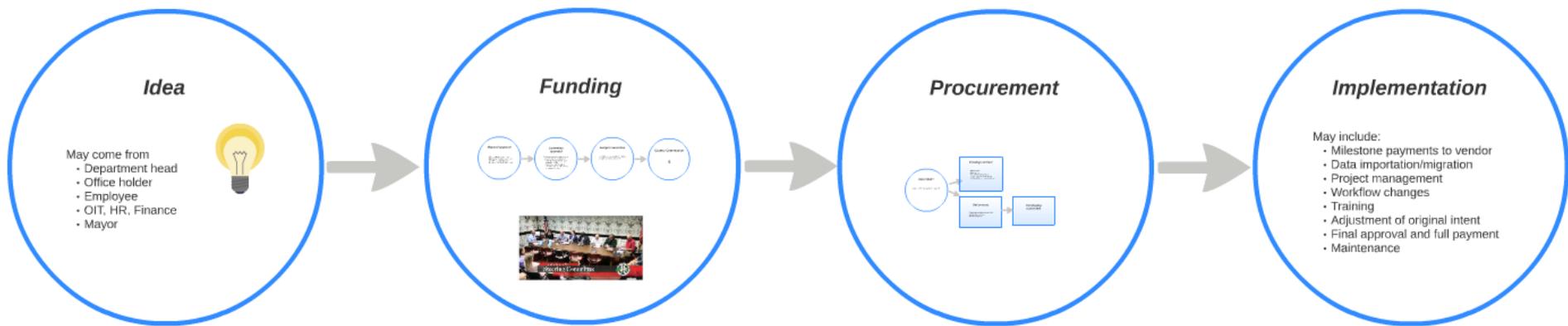


Implementation

May include:

- Milestone payments to vendor
- Data importation/migration
- Project management
- Workflow changes
- Training
- Adjustment of original intent
- Final approval and full payment
- Maintenance

Large I.T. Projects



Software Management Escalation options

1. All software requests must be reviewed and submitted by the Mayor and Office of Information Technology prior to proceeding.
2. If a request is not approved by the Mayor/OIT, the request must be referred to the Mayor's Office of Information Technology for review and approval. An implementation timeline is to be established at this time. If the department does not receive approval, they should use the Mayor's Office of Information Technology for review and approval.
3. If a request is not approved by the Mayor/OIT, the request must receive purchasing committee review and approval even if the request is not approved by the Mayor/OIT.
4. If a request is not approved by the Mayor/OIT, the request must be reviewed by the County Attorney's office and may be referred to a software license legal consultant for review and approval.
5. If a request is not approved by the Mayor/OIT, the request should be given to including an enterprise software evaluation consultant as part of the project.

Software Management Escalation options

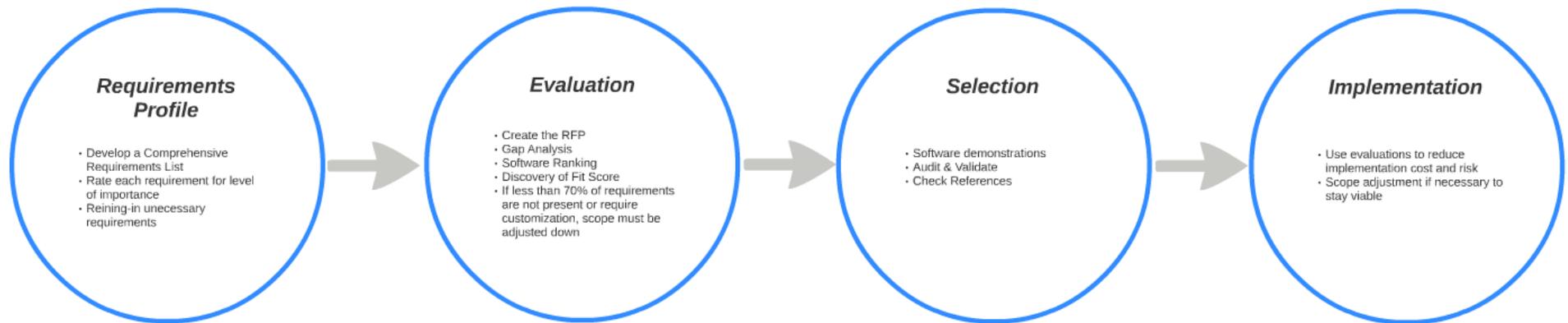
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3. Requests involving software projects of \$100,000 or more must receive purchasing committee review and approval even if an existing (State or Federal) contract is used
4. Software contracts must be reviewed by the County Attorney's office and may be referred to a software license legal specialist, prior to bringing to Commission for approval
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Third Party Enterprise Software Evaluation

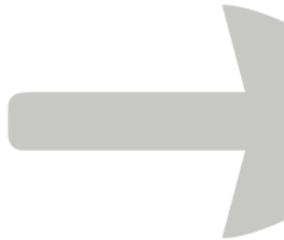
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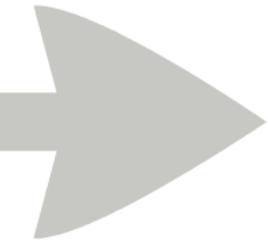
Requirements Profile

- Develop a Comprehensive Requirements List
- Rate each requirement for level of importance
- Reining-in unnecessary requirements



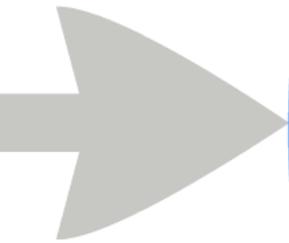
Evaluation

- Create the RFP
- Gap Analysis
- Software Ranking
- Discovery of Fit Score
- If less than 70% of requirements are not present or require customization, scope must be adjusted down



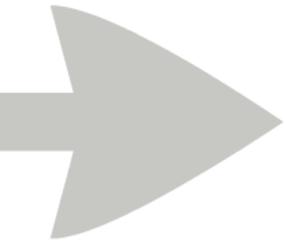
Selection

- Software demonstrations
- Audit & Validate
- Check References



Implementation

- Use evaluations to reduce implementation cost and risk
- Scope adjustment if necessary to stay viable

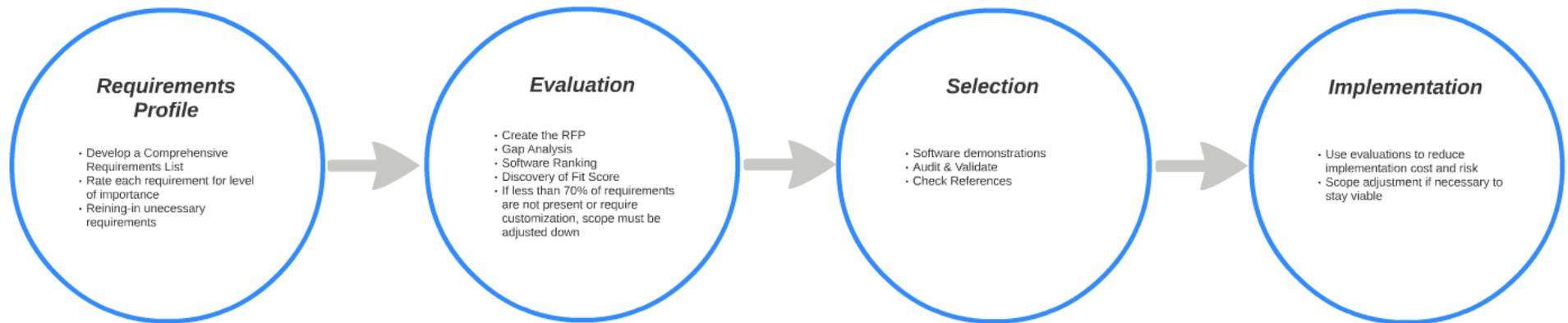


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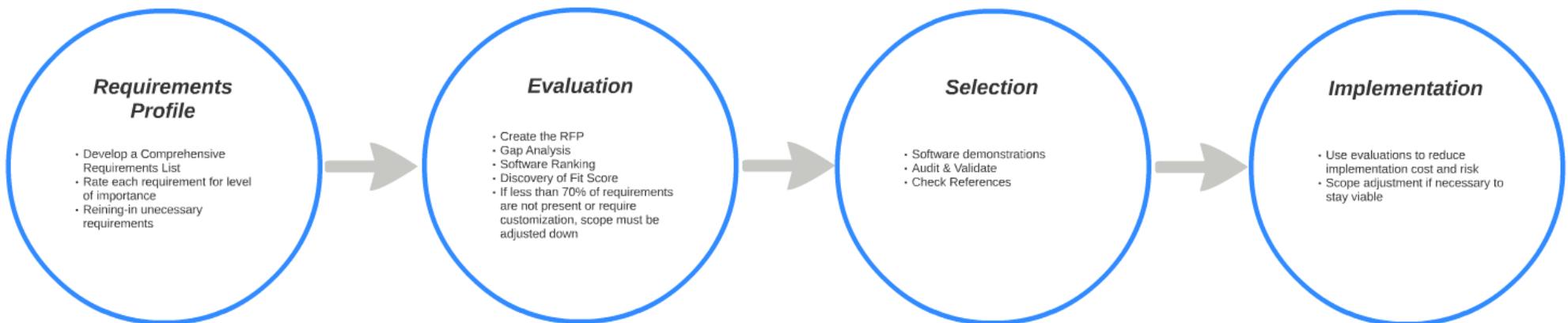
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