

NCCSD State Lessons Learned Webinar Series – Oct. 15, 2021

Procurement/Prioritized Questions

Procurement

PROCUREMENT - Procurement Approach for Each Vendor:

How did you procure each type of vendor that you determined was needed in earlier planning stages (e.g., use the State's Pre-Approved Vendor list, do a Request for Information ("RFI") or go straight to a Request for Proposals ("RFP"), separate RFPs for each phase/module or a single integrator RFP, etc.)? Vendors include, but are not limited to:

Project Management Office ("PMO")

Quality Assurance ("QA")

Independent Verification and Validation ("IV&V")

Design, Development, and Implementation ("DDI")

Training

Organizational Change Management ("OCM")

Staff Augmentation

PROCUREMENT - Procurement Document Development and Evaluation of Responses/Proposals; Best and Final Offer (BAFO) Strategy:

When and how did you familiarize yourself with your state's procurement rules regarding document format, proposal evaluation and the BAFO process? Was it early enough? Whose responsibility was this?

Doing the writing: resources, review process, scoring rubrics, etc. When, how and by whom was this done?

How did you determine what your Cost Proposal would look like and how the vendors were to propose costs (e.g., Time & Materials, Firm Fixed Price, combination, etc.)?

Were there rules around whether your development vendor staff could work off-site? Off-Shore? If so, who is required to be on-site and for what periods of time?

What reference documents did you need the respondents to complete (and how did you conduct and evaluate the reference checks)?

Did you require demonstrations from finalists? Why or why not?

Did you use a vendor to assist in the procurement process also? Why or why not?

PROCUREMENT - Contract Development and Negotiation:

When and how did you familiarize yourself with your state's procurement rules regarding contract negotiations? Whose responsibility was this?

When and how did you identify your resources and establish great communication among them for this effort (legal, finance, IT oversight, subject matter experts ("SMEs"), and other contract signatories and/or approvers, etc.)? Whose responsibility was this?

What were the key components to make sure to include in the contract (e.g., OCSE, IRS, and state standard language; whether or not to include penalties in the contract, etc.)?

Who managed these contracts once done and what skill sets are needed to do so?

PROCUREMENT - OCSE Approval of RFPs, Contracts, etc.:

When and how did you plan for the OCSE approval requirements and time frames (pages I-12 and I-13 in the 2010 State Systems APD Guide)?

What was your strategy for involving OCSE early and often?

Were there any surprises?

