Summary

Today, each California state agency manages their own acquisition of technology and relationship with vendors. Since these efforts are independently repeated at each agency, this produces inefficiencies in time, costs, and effort.

The CA Department of Technology would like to serve CA state agencies by providing a single source of the best options and prices for technology hardware, software and services. This would allow a representative from a state agency to log in and quickly find the technology they need at a pre-negotiated cost, removing a number of steps from each agency's current technology acquisition process.

By centralizing the negotiation and acquisition of technology for state agencies, CDT will be able to improve the efficiency of the State's acquisition processes by lowering state agency costs and risk (see CDT 2016 Strategic Plan, page 5) through streamlining processes and standardizing hardware/software offerings. Additionally, it affords an opportunity for CDT to help state agencies find the right goods for their needs based on CDT's subject matter expertise.

Goals & Measurements

Ease of use
- Requester can quickly find and request hardware/software/services, which match their needs
  - By taking one action from the home page, a Requester can see relevant results
  - Requester says "It was easy for me to find something that fit my needs"
- Administration finds it easy to create, edit, and remove options in catalog
  - Requester says "I could make changes quickly"
  - Page load times are under [x second(s)]
  - *Out of scope: admin can preview their work before publishing*
- Experience is usable on web, tablet, and mobile

End-to-end support
- Requester can feel supported by experts
  - Website presents recommendations from subject matter experts (CDT)
  - Requester says "The website showed me helpful recommendations"
- Requester can manage their request
  - Requester can understand the status of their request
    - *Out of scope: email notifications for status changes*
  - Requester can contact Vendor
    - Requester can cancel order
    - *Out of scope: messaging system*

Reporting
- CDT Administration can gain insight into State Agency trends
  - Trends in orders by department
- State Agency Requester can analyze their orders
  - Total expenditures

Efficiency
- Drive down costs to acquire technology in California state agencies
  - State agency time invested in IT tech acquisition goes down
  - Simplify state agency IT role relating to vendor discovery and negotiations
- Streamline contract negotiations with vendors

References

Prototype A RFI
The working prototype will be an application that will allow authorized users to compare and order end-user computing hardware (e.g., desktops, laptops, monitors), software (e.g., office productivity tools), and related services from pre-established state contracts, and allow authorized users to cancel, track and analyze their orders. In addition, the working prototype will provide the authorized administrative users who are employees of state's lead purchasing organizations – the Department of General Services and the Department of Technology – with the ability to publish product and service information and track, analyze and visualize order data. The working prototype does not need to implement any authentication or authorization against an external directory or authentication mechanism.
Lead Purchasing Organization (Dept of General Services, specifically the Dept of Technology)
Prototype A Resources (list of equipment, etc)

Early Research

We took advantage of CDT's available resources which helped us better understand their high-level strategy and mindset. By learning about similar initiatives (like their cloud & networking initiative), we can infer that this project would align with those projects in their approach to provide technical services to other state agencies.

CDT 2016 strategic plan
- "IT Procurement", page 5
- "Responsive & Effective IT Project Procurement" page 19-21 may have some commonalities

CDT Vendor Forum meeting
Another example of a "catalog" of resources
List of California State Agencies

Questions

These questions have been submitted to CDT based on our review of their Prototype A concept. Their answers have been added below.

After a state agency has submitted a request, who is responsible for managing the relationship with the vendor? (example: if a delay occurs, who knows about it and how do they get in touch w/ the vendor?)
- The State Agency is responsible for managing the relationship with the vendor for the respective purchase.
  - Expose Vendor information on Order Detail

We see hardware and service examples in the "Prototype A Resources" provided, could you please share some software examples?
- Software examples can be obtained via the following:
  http://www.dgs.ca.gov/pd/Programs/Leveraged/SLP/SLPPublishers.aspx

What is an example of a state agency desiring to "analyze" their orders
- Total expenditures by quarter & fiscal
- Total expenditures by category over a period of time
- Expenditures, product counts by vendor

What are some examples of Lead Purchase Org visualizing order data?
- Trends in orders by contract
- Trends in orders by department
- Trends in orders by product number
- Gross expenditures by contract

How does the lead purchasing organization accept payment for state agency orders?
- Direct transfer of funds from the state agency's account