Port of Vancouver USA

IT PROCUREMENT

OVERVIEW OF EFFECTIVE STRATEGIC IT PROCUREMENT FOR PORTS

Rick Cline

Professional & Personal Services Contract Manager

Challenges of a Changing IT Procurement Climate (20-Year Look)

IT Services Contracting Challenges

Strategic IT Procurement Tools

RCW 39.04.270

Port of Vancouver USA

RCW 39.04.270

A request for proposal shall be prepared and submitted to an adequate number of qualified sources.

Notice of the request for the proposal must be published in a newspaper for least thirteen days before the last date upon which proposals will be received.

The request for proposal shall identify significant evaluation factors, including price, and their relative importance.

The municipality shall provide reasonable procedures for technical evaluation of the proposals received, identification of qualified sources, and selection for awarding the contract.

The award shall be made to the qualified bidder with price and other factors considered. The municipality may reject any proposals for good cause and request new proposals.

FOUR AREAS FOR DISCUSSION

Knowledge of the Specific Commodity or Service

Selecting & Developing the Right Procurement Team

The RFP

Negotiating the Contract

KNOWLEDGE OF THE SPECIFIC COMMODITY OR SERVICE

SSSH…

Software

Services (Consultant)

Support & Maintenance

Hardware

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SELECTING & DEVELOPING THE RIGHT PROCUREMENT TEAM

Develop Timeline With the IT Staff For Implementation

Who Are the Customers & Stakeholders?

IT/Procurement Partnership/Relationship

Building The Team

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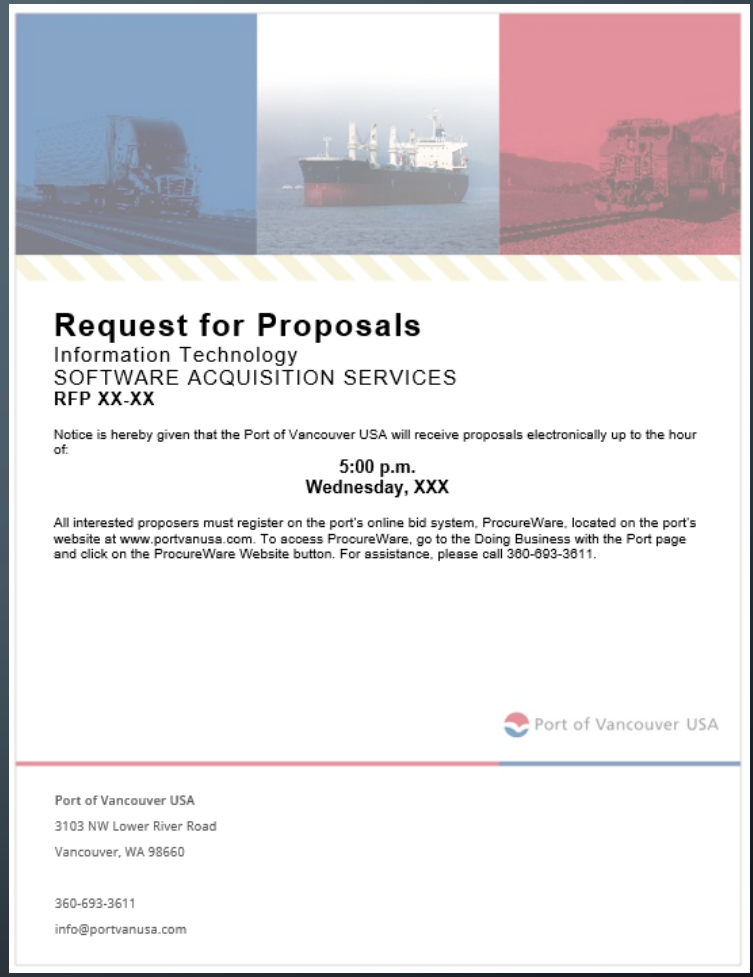
THE RFP

Develop templates for specific IT categories

Use the RFP as a screening tool



Request for Proposals
Information Technology
SOFTWARE ACQUISITION SERVICES
RFP XX-XX

Notice is hereby given that the Port of Vancouver USA will receive proposals electronically up to the hour of:

5:00 p.m.
Wednesday, XXX

All interested proposers must register on the port's online bid system, ProcureWare, located on the port's website at www.portvanusa.com. To access ProcureWare, go to the Doing Business with the Port page and click on the ProcureWare Website button. For assistance, please call 360-693-3611.

Port of Vancouver USA

Port of Vancouver USA
3103 NW Lower River Road
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THE RFP – CONTINUED… SOFTWARE

1.2 SCOPE & BACKGROUND OF PROJECT: SOFTWARE (*description content only*)
The purpose of the software (entity-wide, individual).

- *The type of software being procured.*
- *The software currently being used by the entity (e.g., brand specific/standardized workstations).*
- *Issues of infrastructure compatibility.*
- *Specify maintenance and support expectations, e.g., service response time, escalation processes and procedures.*
- *Specify agency-specific security and confidentiality requirements, if applicable, e.g., hard drive removal so sensitive information is kept by the entity.*
- *Specify data storage requirements and frequency of updates*
- *Cloud storage, specialized computing equipment*
- *Any needed installation or configuration services.*
- *Options for purchasing additional licenses, software upgrades, custom programming or configuration, and ongoing support.*
- *Detail the hardware necessary to house the application.*
- *Request implementation, training, and transition plans.*
- *Detail ownership of licenses upon retirement of any software.*
- *Specify file and data storage requirements.*
- *Specify special insurance requirements, e.g., cyber liability.*
- *State how users will access the application, if applicable.*
- *Request applicable cost discounts, e.g., trade-in, conversion, license quantity, support.*
- *Detail information ownership rights, e.g., data, documentation, source code.*

THE RFP – CONTINUED…

Request for Proposals
Information Technology
CONSULTING SERVICES
RFP XX-XX

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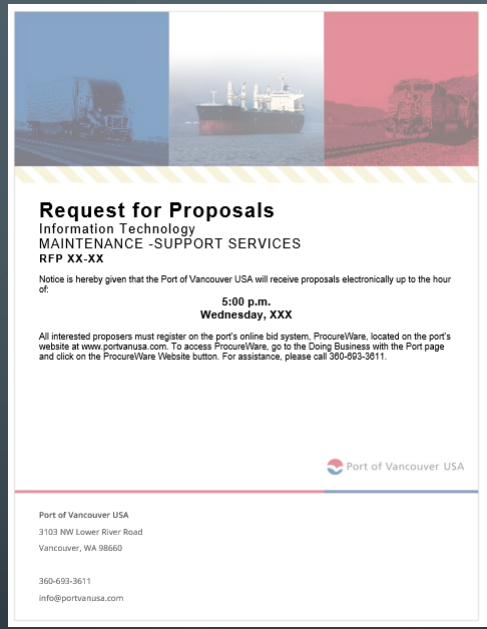

Request for Proposals
Information Technology
MAINTENANCE -SUPPORT SERVICES
RFP XX-XX

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Wednesday, XXX

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Request for Proposals
INFORMATION TECHNOLOGY HARDWARE ACQUISITION SERVICES
RFP XX-XX

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Wednesday, XXX

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THE RFP – CONTINUED… CONSULTANT SERVICES

1.2 SCOPE & OBJECTIVE OF PROJECT

The Port of Vancouver USA is seeking one consultant to provide information technology and support consulting to address the evolving needs of its business administration, operations and security.

The following is a brief general description of services that may be required. The Consultant will conduct all work using applicable codes and standards providing the service to the level of professional care. The most capable consultant selected shall be required to disclose to the port any potential conflict of interest during the term of this agreement.

Additional specific language

THE RFP – CONTINUED… MAINTENANCE/SUPPORT

1.2 SCOPE OF PROJECT

The port is seeking a provider for (Maintenance /Support) services to xxxx.

- Business Objectives
- Technical Objectives

THE RFP – CONTINUED… HARDWARE

1.2 SCOPE & BACKGROUND OF PROJECT: HARDWARE (*description content only*)
The purpose of the hardware (entity-wide, individual).

- *The type of hardware being procured.*
  - *Enterprise support equipment (e.g., servers, network hardware, workgroup printer)*
  - *End user equipment (e.g., workstation, laptop, desktop, monitors, tablets, desktop printer)*
- *The hardware currently being used by the entity (e.g., brand specific/standardized workstations or printers).*
- *Issues of infrastructure compatibility.*

- *Specify maintenance and support expectations, e.g., service response time, escalation processes and procedures.*
- *Specify agency-specific security and confidentiality requirements, if applicable, e.g., hard drive removal so sensitive information is kept by the entity.*
- *Specify data storage requirements and frequency of updates when hardware includes software.*
- *The anticipated lifespan of the hardware and warranty.*
- *Device disposal for either current hardware or new purchases (e.g., recycle, trade-in).*
- *An option for leasing the desired equipment.*
- *Other options (e.g., data center services: hosted server services, virtual server services,*
- *Cloud storage, specialized computing equipment: medical testing equipment).*
- *Any needed installation or configuration services.*
- *The regular and/or specialized maintenance requirements and who can provide the service. (May require a service level agreement)*
- *Options for purchasing additional licenses, software upgrades, custom programming or configuration, and ongoing support.*
- *Detail the hardware necessary to house the application.*
- *Request that Service Level Agreements (SLA) be listed and detailed.*

NEGOTIATING THE CONTRACT

Using (RCW 39.04.270)

Identify Areas of the Supplier Agreement that Poses Risk

Determine How to Negotiate the Areas of Concern

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NEGOTIATING THE CONTRACT

Distinguish The Difference Between The Technology Agreement And The Service Level Agreement

- Technology Agreement:

  - Core Agreement between You and the Consultant

- Service Level Agreement (SLA)

  - Defines the Services and how they will be performed

NEGOTIATING THE CONTRACT REFERENCE GUIDE

- Taxes – Does the agreement reference any applicable taxes?
- Governing Law/Venue – Does the supplier require you to follow their local laws ?
- Unknown/Undefined Costs – Are there any undefined cost within the agreement?
- Automatic Renewals – Does the purchase automatically renew after the expiration date?
- Confidential Requests – Are you required to hide information that should be public?
- Price/Rate Increases – Are there any unreasonable price increases outside of CPI or PPI?
- Termination Rights – Does the supplier have unreasonable rights to terminate?

NEGOTIATING THE CONTRACT REFERENCE GUIDE

- Supplier Liability – Does the supplier remove themselves from all liability?
- Sole Document – Does the agreement state that it is the sole authority or location of terms?
- Terms & Conditions Links – Are there links to terms & conditions not available in the agreement?
- Click Through – Language to protect against click through terms conflicting with the negotiated agreement?
- Solicitation of Employees – Is there language that will have you pay a fine if you solicit their employees?
- Supplier Favored Language – Is there language that overly favors the supplier?
- Supplier Access – Does the agreement allow for the supplier access to your system?
- Audit – Does the agreement allow for the supplier to review how their product is used.

Port of Vancouver USA

WRAP-UP

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