Quick Guide to Making a Technology/Software Purchase*

*Note: This document has been created in conjunction with ITS to provide BC Departments with transparency into the ITS Technology and Software purchase process. It is difficult to specify a timeline as there are many stakeholders involved and there can be significant risk to these purchases. Generally, but not always, the process for large or enterprise wide technology purchases takes longer to complete than the process for smaller purchases. However, there have been instances where small dollar SaaS purchases are deemed to carry large amounts of risk resulting in longer timelines.

BC Department Technology Need is Identified:

- Determine that funding is secured and whether it is operating or capital
- Contact the ITS Lead/single point of contact for your Department (link to ITS Lead list)
- ITS and Procurement determine if this purchase is a sole source...if so proceed with the following steps, if not see the Technology Bid Process below.*

If purchase is a sole source:

- Supplier forwards Contract Docs to ITS Lead
- ITS Lead enters Docs into iContracts and kicks off workflow with IT Security and Architecture review.
- IT Lead forwards S&A(Security and Architecture) Questionnaire to Supplier
- ITS Lead, ITS S&A review the Supplier Questionnaire responses and work directly with the Department to resolve any concerns.
  - If the S&A concerns can not be resolved, a “Caveat Document is created by ITS Lead which outlines the issues and items of risk.
  - BC Customer VP (and IT VP?) agrees to the risks and signs the Caveat Document
- Once the purchase is approved on the Security and Architecture side, ITS, Procurement, BC Legal, Controller’s Office and the BC Customer review and redline the Agreement documents. Redlines will include the Risk Management Insurance Requirements for Tech purchases.
- Procurement compiles all BC redlines and comments and sends them to the Supplier for review and response.
- Supplier reviews and sends back its response to Procurement
- ITS, Legal, BC Customer, Risk Management, Controller’s Office and Procurement communicate internally on the Supplier response.
If there are Legal, Insurance or Business terms/issues that can not be resolved, a “Caveat Document” is created which outlines the issues

- BC Customer VP (and IT VP?) agrees to the risks and signs the Caveat Document

- Once all issues are negotiated or the Caveat Document is signed, Procurement forwards the Purchase Order and a clean copy of the Agreement with ITS signature to the supplier for countersigning.
- Once the Agreement is Fully Executed and the PO forwarded, Supplier and BC Customer begin implementation.

**Technology Bidding Process**

If it is determined by ITS and Procurement that the technology purchase should be bid, these steps would happen just after the “Determine Funding is secured.....” step at the beginning of the process noted above.

- BC Department works with ITS Lead to develop a detailed specifications document and timeline for bidding.
- Procurement Contact works with ITS Lead and BC Customer to Draft the RFP.
- One or more suppliers is identified via POC, Vendor meetings, IT recommendation etc.
- RFP is released to Suppliers.
- Suppliers interested in bidding contact the appropriate Procurement Contact with clarification questions and BC responses go out to all Suppliers.
- RFP responses are received and demos may be held with all or some of the suppliers.
- A Supplier selection is made based on the Supplier offering the best overall value to the University which may or may not be the lowest bid.
- Proceed to....”Supplier forwards contract docs to ITS Lead” step above.
Common Areas of Project/Purchase Order delay

- Creating a requisition when you have already committed to an order/received an invoice for completed work.
- Failure to contact your ITS Lead/Single Point of Contact at the very start of a technology related purchase.
- Failure to include Procurement at the beginning of the purchase bid process.
- Failure to get approval from the Office of Risk Management on Supplier COI.
- Creating requisitions based on an expired contract or with no contract in place

Rev 2 110916