Executive Summary for the Procurement of Requirements $25k and Greater

1. Procurement Planning
   1. Contact the University of Houston Purchasing department at the beginning of the procurement process.
   2. Consider primary objective is to obtain best value for the State: Other criteria are important; not just lowest price.
   3. Consider Historically Underutilized Businesses (HUB): HUB Subcontracting Plan required for contracts $100k and higher.
   4. Form Evaluation Committee of 5-7 people.
      1. Subject Matter Experts: Stakeholders with relevant expertise and knowledge.
         1. Complete Nondisclosure Agreements and Conflict of Interest Forms
   5. Conduct business needs assessment and define requirements.
   6. Collect information on requirement and market.
      1. Consider release of Request for Information (RFI) for market information.
      2. Contact other state agencies for its solutions.
      3. Utilize 3rd party sources (Gartner) and internet searches
      4. Vendor communications are allowed until drafting of the solicitation and Statement of Work (SOW) begins, and then vendor communications must cease.
      5. Avoid vendor communication and product demonstration that may appear to benefit only one vendor.
   7. Develop market ready SOW
      1. The SOW should be clear a thorough description of the products and services to be provided while at the same time fostering competition.
   8. Define how to measure success/vendor performance.
      1. Develop evaluation criteria: Reflects the essential qualities or performance requirements necessary to achieve the objective.
      2. Assign weights to each evaluation criterion that correlate to its importance.
2. Procurement Method Determination
   1. Review alternate contract sources
      1. State of Texas SmartBuy and Department of Information Resources (DIR)
      2. Cooperative Contracts
      3. Consortium/Group Purchasing Organizations
   2. Formal Competitive Bid: RFO: for Software Procurement/RFP: for Services.
      1. Procurement will facilitate the RFO/RFP process as a non-voting team member.
      2. Pros:
         1. Formal competitive bid to determine best value
         2. Allows vendor to provide novel solutions.
         3. Allows additional considerations in addition to price.
         4. Vendor negotiations are allowed.
      3. Con: Time consuming. The State of Texas recommends allowing 180 days for an RFP.
      4. SOW is integrated with the RFP and prepared for market issuance.
      5. Advertise RFP on Electronic State Business Daily (ESBD) for at least 21 days; 30 days is encouraged.
      6. Conduct pre-bid conference to address vendor questions.
      7. Late and non-responsive vendor proposals are rejected.
3. Vendor Selection
   1. Evaluation Committee reviews, evaluates, and scores vendor proposals using evaluation criteria.
   2. Consider EIR Accessibility Criteria: Texas Administrative Code requires procured software/hardware to be accessible for people with disabilities.
4. Award, Contract Formation, and Contract Lifecycle Management
   1. Contract is awarded, negotiated, and bilaterally signed.
   2. BOR must be notified in advance of signing contracts with values $1M and higher.
   3. Contract and vendor relationship should be actively managed for the duration of the contract term and a determination for a new contract must be made at the beginning of the final contract year in the event that the business requirement exceeds the maximum term of the contract.