

Streamline Software Procurement: Two Pilot Projects

DCSS October 19, 2022

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Streamline the software procurement process to expedite acquisitions and improve the customer experience

Pilot 1: Procurement of low risk, low cost IT Software and Services

August 1 - December 31, 2022

Pilot 2: Concierge-assisted process to guide users through the software request process and expand utilization of existing software

October 17 - January 15

Streamline the software procurement process to expedite acquisitions and improve the customer experience

Pilot 1: Procurement of low risk, low cost IT Software and Services

- A Standard for Delegated Authority for Procurement of Low-Risk Software and IT Services that is in effect from August 1, 2022, through December 31, 2022
- Provides Department Head or above authority to sign contracts and make procurement of low-risk software and IT services, including “click-through” agreements that do not go through IT Procurement and Licensing Solutions (ITPALS) or the university’s Procurement Department

Streamline the software procurement process to expedite acquisitions and improve the customer experience

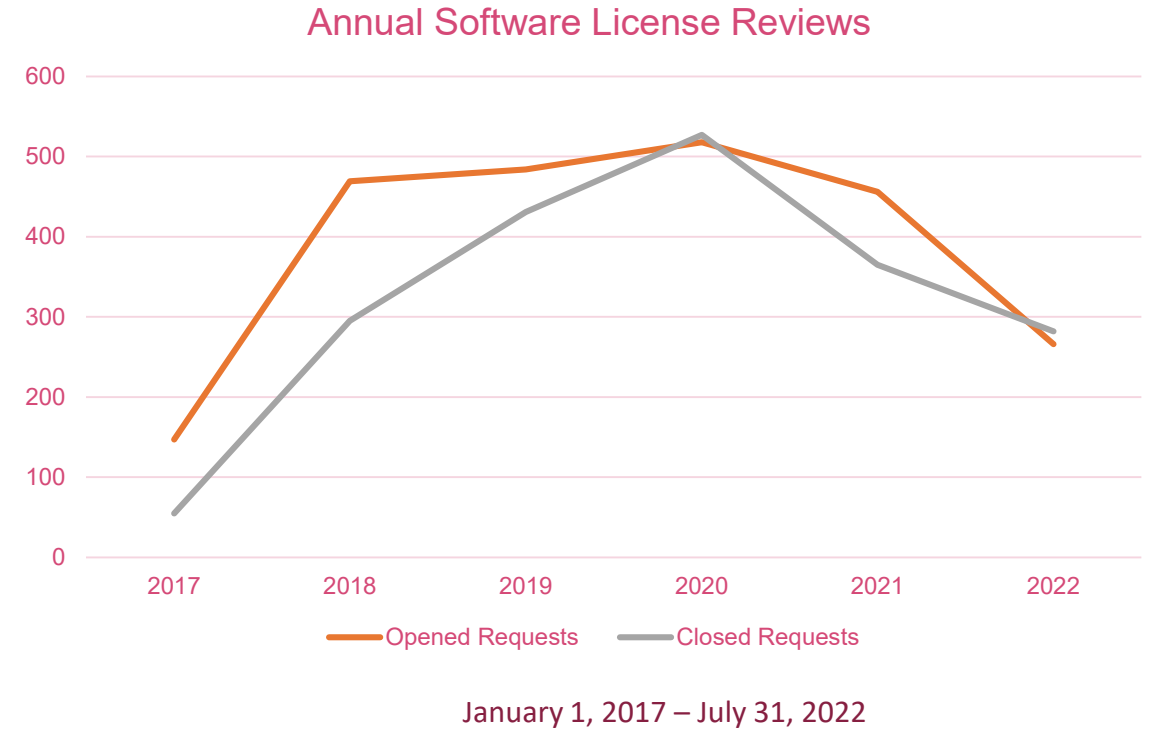
Pilot 2: Concierge-assisted process to guide users through the software request process and expand utilization of existing software

A personalized service that assists the end user by

- Researching the university's previously approved software that may meet user requirements
- Assisting with the completion of the full software license agreement request form

Procurement of low risk, low cost IT Software and Services

- Digital transformation, “There’s an app for that”, and proliferation of cloud-based IT solutions is driving an increased demand in software procurement
- Existing IT procurement practices view all procurement as being equal (requiring the same level of review by Procurement, Legal Counsel, IT Security, FERPA, and Accessibility)
- Inability to keep up with the demand is impacting our ability to support the academic and research mission of the university



How is the pilot being implemented?

Step 1: The department wishing to procure software, or an IT service must assess if the planned procurement meets all the following requirements:

- **Cost:** The cost of the software, IT service, or associated license or subscription must be ≤ \$10,000 on a one-time or annual basis.
- **Data:** The software or IT service must process and/or store only “low-risk” data as defined by the Virginia Tech Risk Classification standard.
- **Impact:** The software or IT service must be used only within a single senior management area or research project (principal investigators may be from multiple units); must not have a data integration with Banner, Blackbaud, Canvas, or other university enterprise software system; must not have a data integration with a system that is processing and/or storing any data that is not low risk as defined by the Virginia Tech Risk Classification standard; and must not be essential to a university-wide service or function.
- **Vendor:** The software or IT service must not be purchased from a vendor or from a country with which Virginia Tech is prohibited from purchasing products or services.

How is the pilot being implemented?

Step 2: The Department Head approves the request to indicate that the procurement meets all requirements for low-risk procurement, agree to all terms and conditions for the software and IT service, and acknowledge that there will not be other reviews of the software, IT service or associated terms and conditions.

Reports of software and IT services procured will be provided to ITPALS and to the IT Security Office (ITSO) for review and software inventory. Past purchases made through this process are subject to review and audit.

Step 3: The procurement may then be completed using HokieMart, via a purchasing card (P-Card), or through an online “click-through” agreement if a payment is not required. Normal rules and cost limits for HokieMart or P-Card procurements apply.

What information is being collected?

Requester Information

Approver/Department Head

Name of Software

Purchase Method

Software Cost

Verification that the software meets all criteria

Vendor Name

Requester Details

Requested By

Primary Contact Phone

Primary Email

Department

* Approver (Department Head)

* Title or name of software/service

* Method of purchase

- HokieMart purchase order - \$10,000 limit
- University PCard - \$2,000 limit
- No cost/free software

* Software cost

Software use factors - select all that apply

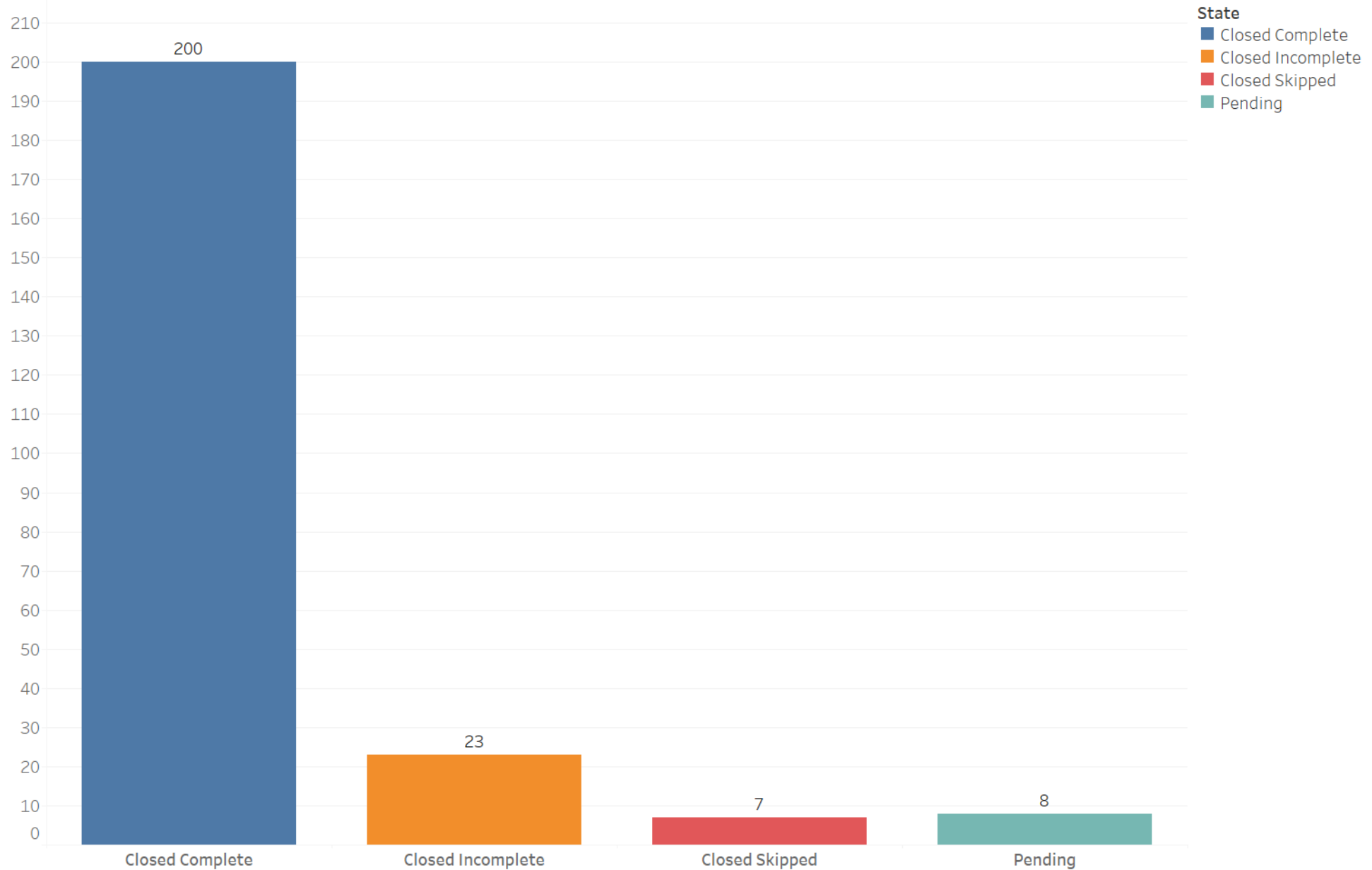
https://itpals.vt.edu/itprocurement/lowriskfaqs.html
Virginia Tech Risk Classification standard: https://it.vt.edu/content/dam/it_vt_edu/policies/Virginia-Tech-Risk-Classifications.pdf"/>

- Does not have any data integration with Banner, Blackbaud, Canvas, Google Workspace, Microsoft 365, VT Login, Single SignOn Authorization, or other university enterprise software system
- Does not have a data integration with a system that is processing and/or storing any data that is not low risk as defined by the Virginia Tech Risk Classification standard
- Will not be utilized to support a university-wide initiative or function.
- Will be utilized by a single business unit of the university or a single research project.
- Will not be used for facilitating the collection of money

* Enter vendor name

Progress to Date

Low-Risk Low-Cost Software Requests Processed
from 8/1/2022 thru 10/18/2022

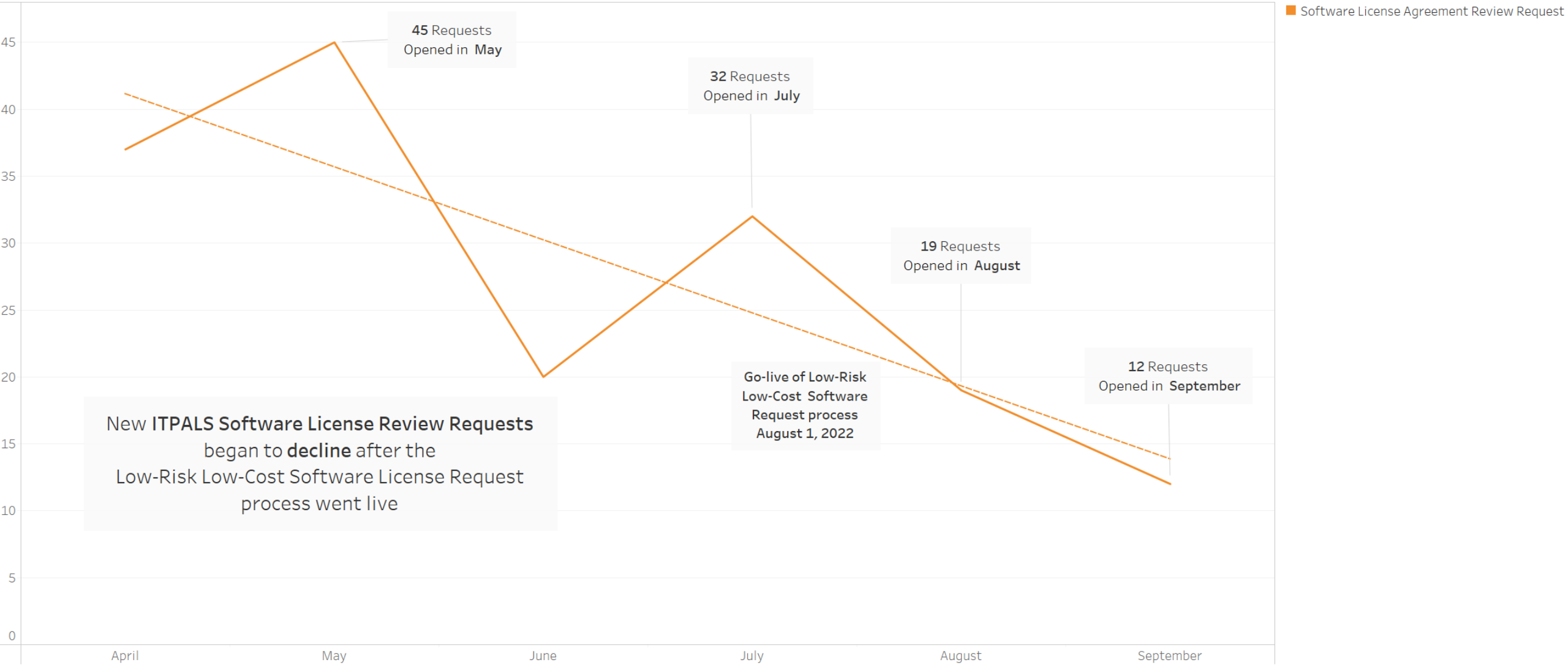


Number of Active for each State. Color shows details about State. The marks are labeled by Number of Active. The data is filtered on Item, which keeps ITPALS Low-Risk Low-Cost Software Request.

Progress to Date

ITPALS Software License Review Requests

Opened in 2022



The trend of Number of Active for Opened Month broken down by Opened Year. Color shows details about Item. The data is filtered on Opened, which ranges from 4/1/2022 11:22:13 AM to 9/29/2022 3:57:10 PM. The view is filtered on Item, which keeps Software License Agreement Review Request.

Next Steps

- Monitor performance and efficacy of the pilot
- Continue to develop the Low-Risk, Low-Cost Software Purchase Pilot FAQ
- Audit low-risk requests for compliance with criteria as-needed
- Assess the risks and user experience associated with the pilot
- Make a final determination on whether to extend the standard beyond the pilot timeline

Pilot 2: Concierge-assisted process to guide users through the software request process and expand utilization of existing software

- Concierge - new position - Natalie Hughes
- Participant group formed in early 2022, independent of Deloitte. Heavy users of procurement process.
- Helped in identifying the need and role for concierge assistance.
- Participating groups: Provost, Enrollment Management, Registrar, Undergraduate Education, BAMS Office of the President, College of Engineering, College of Science, TLOS, Financial Aid, Inclusion and Diversity, National Capital Region, Department of Chemistry, Department of Biological Sciences, Moss Arts Center, School of Neurosciences, College of Architecture Arts and Design

How is the pilot being implemented?

Step 1: The user submits a Concierge Assistance Request through [this portal in ServiceNow](#)

Information requested includes

- department,
- primary user, department IT contact,
- anticipated total cost,
- software name, vendor name, needed-by date,
- categories (administrative, research, teaching and learning, website development), purpose
- estimated number of users, affiliations,
- preferred method of contact

Concierge consults with requestor to gather more details, and analyses Cobblestone system for possible solutions

How is the pilot being implemented?

Step 2:

- If there's a Cobblestone solution, the requestor can proceed to a procurement
- If there's no solution in Cobblestone meeting user needs, the concierge can assist the requestor in completing a [Software License Agreement Review Request](#)

Conciergesupport-g@vt.edu

Questions?



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