



Information Technology Services (ITS)

Technology Contracts at a Glance

August 2023



Introduction

- **PROCUREMENT** is the process for acquiring of various supplies, equipment, professional services and general services through a variety of competitive, fair, and ethical bidding methods.
- **TECHNOLOGY PROCUREMENT** is process of acquiring information technology (IT) products and services.

Types of Services

❖ **Goods and Services**

- Supplies, equipment, and general services that are tangible items
- Examples: Computers, Network Equipment, etc.

● **Professional Services**

- Individuals or firms that provide temporary special services in areas such as finance, engineering, architect, technical, etc.
- Examples: Staff Augmentation, IT Project Planning, Managed Services, etc.

Methods of Solicitation

❖ **Informal Solicitations**

- **Request for Quote (RFQ)** – informal process of requesting pricing from vendors
- **Informal Request for Proposal (IRFP)** – Informal process to procure professional services.

Methods of Solicitation

❖ **Formal Solicitations**

- **Invitation for Bid (IFB)** – award is based on lowest submitted pricing meeting all the technical and contractual requirements
- **Request for Proposal (RFP)** – award is based on a combination of evaluation criteria such as experience, technical expertise and pricing.

Methods of Solicitation

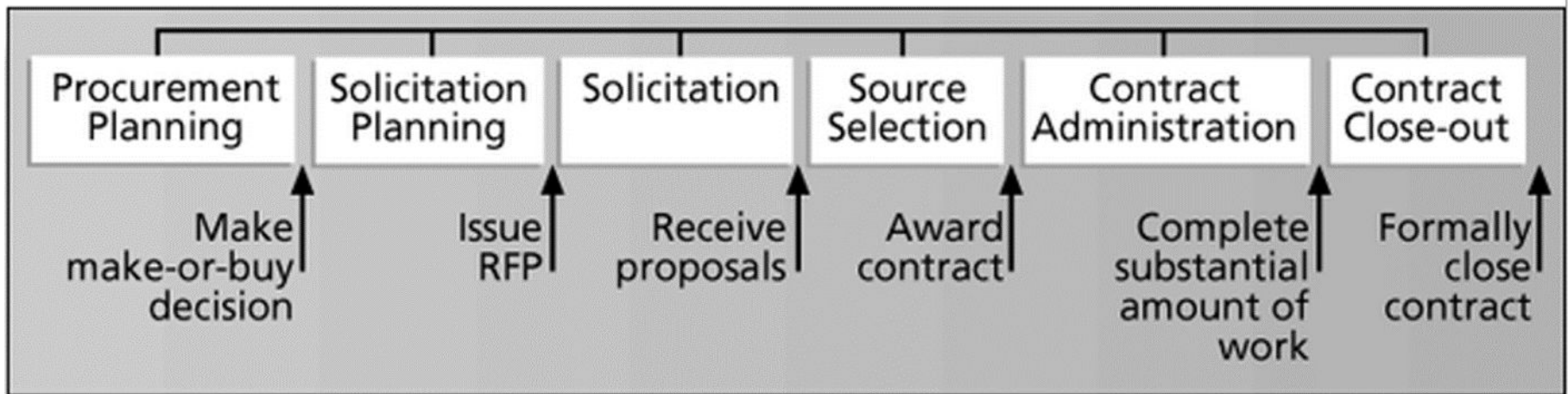
- ❖ **Request for Information (RFI)** – main purpose is to collect information about the features of a various product and/or capabilities of firms.

Solicitation Process

- ❖ Below are a series of activities to acquire goods and/or professional services:
 - **Procurement planning:** The decision to purchase or to provide internally is sometimes called the “make or buy” decision.
 - **Solicitation planning:** determine acquisition schedule and documenting product requirements and identifying potential sources.
 - **Solicitation:** Issuance of request for quotes, bids, offers, or proposals as appropriate.
 - **Source selection:** choosing the team that will eventually evaluate, negotiate and recommend an award.

Competitive Process

- **Contract administration:** managing the relationship with the vendor.
- **Contract close-out:** completion and settlement of the contract.



Competitive Process Exemptions

- ❖ **Master Agreements** – District-wide agreements/contracts that have been negotiated or competed either through an IFB or RFP (i.e. stores warehouse, bench contracts, C-801, C-435, etc.)
- ❖ **Piggyback Agreements** – allows the District to use other public agency contracts (i.e. city, county, state, other school districts, and federal government contracts)
- ❖ **Single Source** – Multiple sources are available but source specifically selected for specific reasons (i.e. service issue, time sensitivity, availability, emergency)
- ❖ **Sole Source** – specific products or services available from one and only one source

Other Considerations

- ❖ Encourage full and open competition
- ❖ Avoid “bid splitting”
 - Public Contract Code sections 20116 and 20657 prohibit the splitting of a contract into smaller work orders, purchase orders or projects to avoid the requirement of competitive bidding
- ❖ Avoid “after the fact” purchases
 - Occurs when goods or services are received prior to having an approved purchase order or agreement
- ❖ Adherence to LAUSD ethics policy
 - Cone of silence
 - Gift limits of \$100 annual cumulative per source
 - Disclosure obligations (Form 700)

Other Considerations

- ❖ Technology purchase now requires ITS approval in the form of a “[Technology Review Request](#)” (TRR) form.
- ❖ A TRR is a review and approval process for purchasing a technology solution that is **not currently available and/or approved for use in the District.**
- ❖ This may include **software, hardware, mobile apps, network equipment, and technology professional services.**
- ❖ The process **protects the safety, security, and fiscal interests** of our District by verifying proper handling of sensitive data, evaluating accessibility and compatibility, etc.



End of Presentation