

Chapter highlights

- **Purpose:** This chapter explains the importance of developing a strong IT Procurement Project Team (PPT) with the right resources, the right skills and the time needed to complete the job.
- **Key points:**
 - The PPT should assemble as much knowledge as possible to ensure the best qualified supplier is selected.
 - PPT members/evaluators will be required to complete a Confidentiality and Conflict of Interest Statement.

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13.0 Introduction

utilizing a procurement project team (PPT) throughout the IT procurement process is an identified IT procurement best practice. Use of a PPT will help ensure:

- Project needs are addressed in a timely manner.
- Requisite project disciplines are represented.
- Resources, roles and responsibilities are available, clearly identified and assigned up-front.
- The cumulative benefits of each team member’s experience are maximized.
- A level playing field is maintained for all contending suppliers.
- Accountability and responsibility of the team members.
- Efficient use of everyone’s time.

PPTs need the same widespread and diverse variety of skill sets as any other team. It is often a challenge to identify those persons with the right types of skill and experience when building the team. Selecting valuable members is particularly important when working with cross-functional teams. The procurement lead/sourcing specialist will work with the project’s business owner to facilitate the development of this team, assign roles and responsibilities, and lead the team through the procurement process. Usually the PPT is also the evaluation team; however, there may be instances where the composition of these teams will differ.

13.1 Selecting PPT members

The key to building a strong PPT is finding resources with the right skill sets and the time needed to complete the procurement project. These people should be stakeholders in the

final product or service and/or individuals who have knowledge and skills to fill a particular area of expertise or project discipline.

There are four main project skill sets or knowledge areas that the PPT should possess:

- Functional: expertise in the business needs of the project
- Technical: expertise in the IT or technical aspects of the project
- Financial: expertise in financial analysis of potential suppliers
- Contractual: IT expertise in development and review of the solicitation and contract documents

It is important to select team members who fully understand the needs of the public body acquiring the IT goods and/or services and the desired outcome of the procurement. The PPT should possess as much valuable knowledge as possible to ensure the best qualified supplier is selected. It is recommended that the PPT provide input into the solicitation document, especially the evaluation criteria. The team members should fully understand the requirements of the solicitation and must be able to critically read and evaluate responses.

Beyond covering the four major project skill sets, the following are important qualities to look for when considering members for your PPT:

- Strategic thinking ability to understand and conceptualize the potential improvement in an IT service area(s).
- IT project management and technical skills to convert strategic thought into practical plans for the project's total IT life-cycle.
- Understanding of the Commonwealth's and the public body's strategic IT objectives to foster those objectives and to deter potential short- and long-term conflicts.
- Risk assessment and mitigation skills to help reduce potential IT technical, schedule, cost, security, confidentiality, and/or contractual obstacles and issues.
- Procurement skills for the specialized complexity associated with IT acquisitions.
- Negotiation skills for IT products/services/solutions with the competency to arrive at a satisfactory conclusion.
- Enthusiasm and drive to see the project succeed.
- Objectivity to ensure that all proposals will be viewed equally based on their merits.

The PPT should be formed and functioning soon after the agency business need is identified. Input from all those responsible for significant aspects of the acquisition should be obtained as early in the process as possible. This is particularly important for procurements with critical time requirements. Early planning serves to shorten the acquisition process.

13.2 Defining roles and responsibilities

The recommended size of a PPT is three to five members; however, some projects may require additional members due to the nature or complexity of the procurement. Coordination and management of the evaluation phase of the procurement process becomes more difficult as the size of the team increases. To avoid potential individual bias, the evaluation team should not have less than three members. There will be instances where the evaluation team is comprised of a different group of individuals than the PPT, due to the need for temporary, non-voting subject matter experts or consultants, or due to non-participation by a PPT member(s).

After the PPT is in place, the business owner and procurement lead/sourcing specialist will discuss the goals and business needs of the project with the team. The procurement lead/sourcing specialist describes the sourcing process and the roles and responsibilities of

the PPT and/or evaluation team members. Please refer to [Chapter 11](#), IT Procurement Planning and Strategic Sourcing, which provides a detailed table defining the roles and responsibilities of each member of the PPT.

The procurement lead/sourcing specialist assigned as the procurement's single point of contact (SPOC), the business owner and the technical subject matter experts (SMEs) will work together to create evaluation criteria based on the Commonwealth's or agency's business needs. The evaluation criterion allows the PPT to collect the necessary data to evaluate the suppliers' proposals. For example, evaluation criteria might include factors such as total cost of ownership, quality of goods or service, performance history of suppliers, risk assessment, availability and level of technical support. For more in-depth discussion of this, refer to [chapter 24](#) of this manual, Requests for Proposals. PPT/evaluation members are requested to complete and submit the survey in Appendix B at the close of each procurement where an evaluation was conducted. The SPOC should provide members with the survey form and submission details. VITA SCM is collecting and sharing lessons learned. Commonwealth IT procurement professionals and project managers may contact scminfo@vita.virginia.gov if interested in obtaining and/or sharing evaluation team lessons learned.

13.3 Confidentiality

The PPT and/or evaluation team have planning and source selection sensitive information and supplier proposal information that must be marked and treated confidentially and must not be released outside the PPT/evaluation team. It is imperative that all members of the PPT and/or evaluation team fully understand they must not disclose any such confidential information to any person not authorized to receive the information nor to any person who has not signed a confidentiality and conflict of interest statement. Generally, only the team members and certain selected personnel with a need to know have access to the procurement information. All information and documentation relative to the development of a specification or requirements document, the solicitation documents and the contractual documents will be deemed confidential in nature until a contract is awarded.

PPT members/evaluators and anyone given access rights to the confidential information will be required to complete a confidentiality and conflict of interest statement (see Appendix A). The SPOC is responsible for obtaining and maintaining all signed agreements. All PPT members/evaluators must agree to the following:

- Agrees that no gift, benefit, gratuity, or consideration will be accepted or a personal or financial interest in a party who is bidding or proposing or associated with a bidder/proposer initiated on a project or procurement. (Refer to [chapter 5](#) of this manual, Ethics in Public Procurement.)
- Certifies that all information concerning the planning, processes, development or procedures of the project or procurement will be kept confidential and secure.
- Certifies that no copy or disclosure of info will be made to any other party who has not signed a copy of this confidentiality agreement.
- Understands that the information to be kept confidential includes specifications, administrative requirements, contractual terms and conditions and includes concepts and discussions as well as written and electronic materials.
- Understands that if he/she leaves the procurement team before a contract is awarded that all information must still be kept confidential.
- Agrees that any instructions provided by the sourcing specialist relating to the confidentiality of information will be strictly followed.

- Agrees to immediately advise the SPOC in the event that he/she learns or has reason to believe that any person who has access to confidential procurement information has or intends to disclose that information in violation of their agreement.
- Certifies that he/she has no personal or financial interest and no present or past employment or activity which would be incompatible with participation in any activity related to the planning or procurement processes for the procurement.

Appendix A
Procurement Project/Evaluation Team Confidentiality
and Conflict of Interest Statement

This form is available on VITA SCM's website at the following URL:

http://www.vita.virginia.gov/uploadedfiles/VITA_Main_Public/SCM/Templates/Confidentiality_ConflictOfInterest_Statement.doc

Appendix B
Evaluation Team Survey

This form is available on VITA SCM's website at the following URL:

http://www.vita.virginia.gov/uploadedfiles/VITA_Main_Public/SCM/Templates/eval_team_survey.doc