



Enterprise Technology
Services Department
Procurement Study

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TABLE OF CONTENTS

Executive Summary	3
Study Methodology	9
Miami-Dade County's IT Procurement Process	9
ETSD Procurement Workload Analysis	11
Florida Counties IT Procurement Comparison	15
Case Studies	
• 911 Dictaphone Maintenance	16
• Data Storage Library Maintenance	
• Radio Antenna Tower Maintenance	
Findings and Recommendations	20
Appendices	
• Highlights from Past Procurement Studies	25
• Legislative and Policy Framework for Miami-Dade County Procurement	
• Selected References	

EXECUTIVE SUMMARY

In early 2007, Miami-Dade County's Chief Information Officer (CIO) and Director of the Enterprise Technology Services Department (ETSD), Mr. Don Fleming, requested that the Office of Strategic Business Management (OSBM) evaluate the efficiency and effectiveness of Information Technology (IT) procurement, as it is practiced in Miami-Dade County. Specific concerns included:

- Service contracts that expire prior to award of a successor contract and protracted procurement timelines to obtain service contracts
- Redundancy or misplaced responsibilities within the County's IT Procurement Process, within which, the ETSD IT Procurement Model is a major component
- Adequacy of ETSD staff resources to provide IT procurement services
- Impact of procurement rules and opportunities to streamline the County's procurement process

Expiring Service Contracts / Procurement Process Delays

The problems encountered by ETSD with expiring service contracts and procurement process delays appear to arise from three fundamental management issues relating to:

◆ *Interdepartmental Communication and Cooperation*

From interviews with staff of ETSD's Information Technology Business Office (ITBO - commonly referred to as ETSD Central Procurement) and the Information Technology Unit (IT Unit) and Competitive Acquisition Unit (CA Unit) within DPM, it is clear that professional interdepartmental communication and cooperation has broken down. Regularly scheduled meetings are not being held; although meetings are held on a case-by-case basis to discuss specific requisitions. This strained relationship is adversely affecting the IT Procurement Process, as evidenced in the Data Storage Library Maintenance case study included in this report.

◆ *Advanced Acquisition Planning (AAP)*

AAP is probably the single most effective means ETSD and DPM can employ to prevent delays in the IT Procurement Process. The three case studies included in this report show, to varying degrees, how the lack of AAP can adversely affect seemingly straightforward solicitations and waste limited County resources. The primary impediment to implementation of AAP seems to be a mind-set that there is insufficient

ETSD IT Procurement Study

OSBM



time to stop and plan ahead because there is so much work to be done right now. This approach does not take into account that a significant amount of today's workload likely resulted from yesterday's lack of AAP.

◆ *Technical Specification Writing*

Improving technical specification writing skills within ETSD and its user departments is second only to AAP in its potential to facilitate IT procurement. Referring to the Organizational Workflow and Approval Path diagram in Exhibits 1 & 1A (attached), most procurement items transmitted from the ITBO to DPM originate from either user departments or the operations divisions within ETSD, which provide services for user departments. Both ITBO and ETSD operations division staffs acknowledge that a lack of technical specification writing capability exists in user departments and ETSD as well.

ETSD IT Procurement Model and DPM Interface

Aside from an accountability/responsibility issue covered in the next section of this executive summary, the County's IT Procurement Process and its ETSD IT Procurement Model component appear to be functioning properly. Problems such as redundant market research performed by the ITBO and DPM, identified in the January 26, 2004, Analysis of Information Technology Procurement (see Appendix 1), which continue today, are largely byproducts of the three management issues mentioned in the previous section. Since the June 28, 2007 final draft of this report was issued, in an effort to further streamline the IT procurement review process, DPM has, on a pilot basis, transferred responsibility for the competitiveness review function (for IT items only) from the CA Unit to the IT Unit.

To fully appreciate the structure and functioning of IT procurement in Miami-Dade County, the following three important factors must be understood:

◆ *Pool Contracts*

A significant portion of ETSD's procurement work is accomplished using pool contracts with multiple pre-qualified vendors (i.e. IT Consulting, IT Hardware, Telecommunications, etc.). Many of these contracts contain detailed procedures or "Roadmaps" that allow user departments, including ETSD, to prepare statements of work (SOW's), issue requests for quotes (RFQ's), award contracts and process "Requests for Review" (informal bid protests), all without DPM involvement. This means that much of the procurement work taking place at ETSD is self-contained, and therefore, controlled by ETSD staff.

ETSD IT Procurement Study

OSBM



◆ *ETSD/DPM Interface*

Exhibit 1A shows in detail the interface between the ETSD IT Procurement Model and the DPM component of the County's IT Procurement Process. The ETSD/DPM interface has been specifically designed and staffed to manage ETSD procurement items. Interface items include: New Contracts, Contract Renewals, Items over \$1 million, Sole Source Contracts, Waiver of Competitive Bidding, and Emergency Purchases. The items included in the ETSD/DPM interface are often ETSD's most complex and potentially controversial items.

◆ *Non-Competitive Purchases*

Due to the nature of IT purchasing, ETSD has a disproportionate number of Sole Source and Bid Waiver items when compared to other departments. The Competitive Acquisitions Unit within DPM has informed OSBM that forty-four percent (44%) of all non-competitive County contracts are for IT purchases.

ETSD Staff Resources

ETSD implemented an internally decentralized procurement model, effective July 31, 2006. Decentralization shifted responsibility for purchases valued up to \$100,000 from the ITBO to three operations divisions; Field Services, Radio and Telecommunications (Telecom). Decentralization allowed ETSD to reduce the number of staff positions in the ITBO from nine to four. Two of the operations divisions, Field Services and Radio, each have one dedicated procurement position. Field Services and Telecom rely on non-procurement professional staff that have other duties within the organization to perform some or all procurement tasks. This model has enabled the operations divisions to be more responsive to their user department clients; however, management issues arising from this organizational change require attention, as follows:

◆ *Professional Oversight and Accountability*

The ITBO is the central authority on procurement matters for ETSD, however, ITBO staff are concerned that a lack of staff resources prevents them from providing appropriate professional oversight for procurement activities taking place in the operations divisions. It is OSBM's understanding that when procurement problems occur in the operations divisions, the ITBO is often called upon to sort them out although they were not directly involved, creating an oversight/accountability problem. Potentially compounding this problem, the operations Division Directors all report to an Assistant Director that does not have responsibility for the ITBO; the ITBO reports to a Division Director that reports directly to the Department Director. ETSD management should further explore this issue and find the proper balance between procurement independence, oversight and accountability.

ETSD IT Procurement Study

OSBM



◆ *ITBO and Operations Divisions Staffing and Staff Capabilities*

ITBO - The two Contracts and Procurement Officers in the ITBO each process an average of 77 procurement items per year or 1.7 items per week, with an average value per item of \$168,599. At face value, this workload level does not appear to be excessive. Benchmarking research on other County departments and Florida counties was inconclusive in this regard. OSBM recommends that the three fundamental management issues identified previously be addressed prior to a further assessment of ITBO staffing requirements.

Field Services Division - The Buyer position in Field Services appears to be handling an excessive number of purchasing transactions (974 per year) when compared to other Buyer level positions in ETSD and other County departments. This report recommends that the workload for this position be redistributed among existing staff or that ETSD itself validate the need for an additional procurement professional to assist in Field Services and request this addition through OSBM. The validation would include factors such as: (1) the extent to which overtime is required to complete daily tasks, (2) a decline over time in the quality of work produced (i.e. increased error rate), and (3) the extent to which this particular task requires less time or effort per item processed (i.e. Is the high number of transactions justified due to the repetitive nature of each task?).

Telecom Division - A lack of specification writing capability was identified in the Telecom Division. OSBM recommends that ETSD validate the need for a procurement professional with technical specification writing skills to assist the Telecom Division and request this addition through OSBM. The validation would include factors such as: (1) a review of the quality of draft specifications prepared by Telecom staff, (2) the number of times specifications require substantial revisions, and (3) the amount of time it takes for Telecom staff to prepare a set of workable specifications.

Procurement Rules and Opportunities to Streamline the Procurement Process

Appendix 1: Highlights from Past Procurement Reports/Studies provides an overview of the various recommendations to streamline the procurement process going back to 2002, some of which have been implemented. Appendix 2: Legislative and Policy Framework for Miami-Dade County IT Procurement itemizes the various Charter, County Code, Administrative Order and Guideline provisions that govern purchasing in Miami-Dade County. As mentioned above, DPM is piloting a change to their IT review process that should eliminate some redundancies and minimize process delays.

Pool contracts in particular have been effective in providing user departments greater control over the procurement process. For example, if a department with allocated funds on the County's IT Hardware Pool Contract (State Contract # 250-000-03-1) desired to purchase a personal computer, they would review the price lists for a minimum of three

ETSD IT Procurement Study

OSBM



awarded manufacturers or resellers online and make the purchase at the most competitive price by processing a contract release through the Advanced Purchasing Inventory Control System (ADPICS). This process could be made more efficient by establishing IT purchasing standards that further guide departments in their purchasing decisions.

The following is a complete and prioritized list of study recommendations, which are supported by procurement case studies and findings discussed in subsequent sections of this report:

OSBM Recommendations in Priority Order

1. ETSD and DPM supervisors and managers should exercise appropriate management authority to ensure employees involved in the IT Procurement Process are working together in a constructive and professional manner (i.e. required monthly interdepartmental meetings facilitated by upper management, group and individual counseling by supervisors, required conflict resolution training, etc.).
2. ETSD and DPM should enter into a formal process, facilitated by OSBM, toward making Advanced Acquisition Planning (AAP) an integral part of the IT Procurement Process.
3. Ensure that all ETSD staff members responsible for writing technical specifications are properly trained through the National Institute for Governmental Purchasing (NIGP) or other appropriate means.
4. ETSD should work collaboratively with its user departments to ensure that all departmental staff members responsible for writing technical specifications are also properly trained.
5. Determine the appropriate level of ITBO oversight for procurement activities performed solely within the Field Services, Radio and Telecom operations divisions and ensure necessary resources are available to perform this function.
6. ETSD should first implement OSBM recommendations 1-5, and subsequently re-evaluate the need for additional resources within the ITBO.
7. DPM should propose an amendment to Master Procurement Administrative Order 3-38 to clarify that technical specification development responsibilities lie within operational departments, and departments that write technical specifications will be held accountable for their quality and accuracy; a process for implementing this policy should be included in the DPM Procurement Guidelines.

ETSD IT Procurement Study

OSBM



8. If feasible, redistribute the procurement workload within the Field Services Division among existing staff or validate the need for an additional procurement professional in Field Services and justify this to OSBM.
9. Validate the need for a procurement professional with technical specification writing skills in the Telecom Division and justify this requested addition to OSBM.
10. Consider increasing the \$100,000 cap on purchase approvals within the ETSD operations divisions for budgeted items when there is an adequate allocation on an existing contract.
11. DPM should add an ActiveStrategy Enterprise (ASE) scorecard measure for the number of contracts that expire without a successor contract or alternative means in place for procuring a required good or service.
12. The term Information Technology Business Office (ITBO) connotes a scope of IT procurement review no longer associated with ETSD procurement. It may also contribute to confusion regarding ETSD's role in the IT Governance Process. ETSD should formally retire the term ITBO and replace it with the often used ETSD Central Procurement Unit or some other more up-to-date identifier.

Report Structure and Highlights

This report begins with some general background on the IT Procurement Process in Miami-Dade County, followed by a workload analysis for the ITBO and ETSD operations divisions. Process workflow diagrams (Exhibits 1 and 1A) provide a visual "snapshot" of the overall County IT Procurement Process. Three case studies related to maintenance service contracts, including: 911 Dictaphone Maintenance, Data Storage Library Maintenance and Radio Tower Antenna Maintenance are included to better illustrate the basis for some of the findings and recommendations. The Findings and Recommendations section builds on the case studies and pulls together insights from the workload analysis, staff interviews and other research. Appendix 1 includes overviews of three past procurement studies, in order to provide for a broader understanding of how thinking on IT procurement and procurement generally in Miami-Dade County has evolved over time.

ETSD IT Procurement Study

OSBM



Study Methodology

The study methodology consisted of three task areas: (1) Background and Research, (2) Workflow and Process/Models, and (3) Findings and Recommendations. The components of these task areas are identified below:

1. Background and Research –
 - a. Review of past procurement studies (refer to Appendix 1)
 - b. Review the legislative and policy framework within which IT decisions are made (refer to Appendix 2)
2. Workflow and Process/Models –
 - a. Develop an understanding of the current ETSD IT Procurement Model, including the ETSD and DPM interface/decentralization of procurement functions within ETSD
 - b. Identify and map key process workflows
 - c. Review and diagram pertinent ETSD/DPM staff assignments
 - d. Conduct a summary review of IT procurement models used in comparable jurisdictions
3. Findings and Recommendations –
 - a. Develop recommendations for organizational, process and/or policy changes that will address any identified issues

Much of the information used in the study was provided by ETSD staff from its ITBO, and staff from DPM's IT Unit and CA Unit. Staff from the Field Services, Radio and Telecom operations divisions within ETSD also provided information significant to the project. The information was gathered during numerous face-to-face interviews, supplemented by hard copy and electronic data, as well as follow-up telephone conversations (refer to Appendix 3 – Selected References).

Miami-Dade County's IT Procurement Process

IT Governance Process

High level IT policy and funding decisions are made through a formalized governance process. The process consists of a Governance Board, Leadership Council and Industry Advisory Council. The Governance Board approves the County's IT Strategic Plan and

ETSD IT Procurement Study

OSBM



decides the scope and budget for overall IT investments at the enterprise and departmental levels. The Leadership Council recommends strategies, budgets, initiatives and actions to the Governance Board, prepares and manages implementation of the IT Strategic Plan at the enterprise and departmental levels and establishes Advisory Sub-Councils and Ad-Hoc committees to address IT related issues affecting multiple departments. The Industry Advisory Council identifies IT trends and innovative use of IT from an external perspective.

The IT Leadership Council held its first meeting on December 7, 2006. The Council's draft charter sets out the actions it will undertake to fulfill its responsibilities, including: definition, implementation, support and enforcement of IT-related standards, policies and procedures; raising and discussing issues of importance to multiple departments; promoting communications and collaboration around IT-Related issues across the County; and promoting the efficient operation of cross-functional and cross-organizational business processes. It is anticipated that the IT Governance Process, through specific actions taken by the Council, will significantly influence the County's IT procurement process.

Miami-Dade County IT Procurement Process

The IT Procurement Process begins with identification of a need for an IT good or service within ETSD or an ETSD user department. The larger ETSD user departments, which rely on ETSD for some or all of their IT needs, include: Miami-Dade Police Department, Water and Sewer Department, General Services Administration and Clerk of Courts. The path a particular procurement item (i.e. small purchase order, contract release, invitation to bid, request for proposals, and request for qualifications, bid waiver, sole source or emergency purchase) takes through the IT Procurement Process is dependent on its dollar value and degree of competitiveness. A graphic overview of the County's IT Procurement Process organizational workflow is provided in Exhibit 1, accompanied by a more detailed organizational workflow and approval path diagram provided in Exhibit 1A.

IT procurement items are initiated using an ETSD Procurement Services Request (PSR) form. For ETSD division assisted items, the PSR form is completed by the responsible ETSD operations division (Field Services, Radio or Telecom). For items submitted directly to the ITBO, which are typically over \$100,000, the PSR form is completed by the user department.

Division assisted items up to \$100,000 are processed within the responsible ETSD operations division, with the exception of any item over \$10,000 where a requisition (new contract) is required. The requisition would be processed through the ITBO and approved by the IT Unit. Division assisted items over \$100,000 must be submitted to the ITBO for approval. Unless otherwise permitted by the terms of a pool contract, items over \$1,000,000 must be reviewed by the IT Unit prior to submission to the Board of County Commissioners for approval. All bid waiver, sole source and emergency items, regardless of their dollar amount, must be submitted to the CA Unit via the IT Unit.

ETSD IT Procurement Study

OSBM



ETSD Procurement Workload Analysis

As discussed above, ETSD procurement activities take place within the ITBO and the operating divisions of Field Services, Radio and Telecom. This section provides an analysis of workload data for these units and includes comparative workload data from other County departments. The most current purchase order data available from ETSD covers a seven-month period from August 1, 2006 through February 28, 2007. As noted in the Executive Summary recommendations list, Field Services may need an additional Buyer and Telecom may need a procurement professional that has technical specification writing skills. Additional resources may also be needed within the ITBO to provide adequate oversight of procurement activities in the operations divisions.

While the results of the analysis provide a generalized basis for workload comparison, it must be kept in mind that the data used in the analysis did not specifically differentiate procurement items based on their relative level of complexity. For ETSD processed items, average dollar value per procurement item figures are provided as a surrogate measure of item complexity or difficulty, in order to take this important factor into account.

ITBO Procurement Workload

The ITBO is comprised of 4 positions: IT Contracts and Procurement Supervisor (Pedro Cacicedo), IT Contracts & Procurement Officer (Mirta Cardoso), IT Contracts & Procurement Officer (Manny Fernandez) and Buyer (Pedro Batista). Table 1 below shows the relative workload measures for each purchasing position.

Table 1: ITBO Workload

ITBO		Statistics for Purchase Orders processed from 08/01/2006 – 02/28/2007			
Staff Member	Annualized Number of PO's	Actual Number of PO's	Percent of Division PO's	Total Value of PO's	Average Value of PO's
Pedro Batista	337	238	69%	\$6,587,527	\$27,678
Manny Fernandez	71	50	14%	\$7,516,162	\$150,323
Mirta Cardoso	83	59	17%	\$11,025,642	\$186,875
Totals	491	347	100%	\$31,873,958	\$91,856

The Buyer, Pedro Batista, processed nearly 70% of the total procurement items, however, it is clear from the average dollar amount per item that these items are generally of lesser complexity and therefore, require less time and interdepartmental coordination. Pedro's workload is in line with data from other departments shown in Table 5. The Contracts and Procurement Officers process, on average, 77 procurement items annually, with an average value per item of \$168,599. Assuming they work 46 weeks per year (52 weeks – 2 weeks

ETSD IT Procurement Study

OSBM



vacation, 2.5 weeks holidays and 1.5 weeks sick leave)), they must each process approximately 1.7 items per week. On its face, even accounting for the high level of item complexity, processing less than two items per week per position seems manageable, subject to benchmarking.

Between the issuance of the final draft version of this report in June 2007 and this final report, OSBM solicited workload data for positions that primarily handle IT purchasing from three Florida Counties, only one of which responded. The sole respondent, Pinellas County Purchasing Department, contains six Procurement Analyst positions that deal directly with user departments in the preparation of procurement items. One of the six positions handles all technology and telecommunications purchases. This position also handles all fleet and equipment purchases. On an annualized basis, this position processes approximately 46 procurement items (one per week) with an average per item dollar value of \$318,000 (FY2006-07 figures). This number of items processed is approximately 60 percent of that processed by the ITBO Procurement and Contracts Officers, but the level of complexity, represented by the dollar value per item is nearly twice that handled by the ITBO positions. While the Pinellas County information is of interest, no definitive conclusions can be drawn from this single data set.

As noted in recommendation 6, and discussed later in this section and the Findings and Recommendations section, the need for staffing adjustments in the ITBO should be re-evaluated subsequent to implementation of recommendations 1-5. Since recommendations 1-5, once implemented, should favorably impact the workload in the ITBO, this two-step process is recommended.

Field Services Procurement Workload

Within the Field Services Division there are currently three employees: a Buyer fully dedicated to purchasing and two employees responsible for certain purchases in addition to their other responsibilities; specifically, Buyer (Orlando Martinez), Electronic Parts Specialist (Abdul Hakeem) and Communications Service Rep. (Rosa Nunez). Table 2 below shows the relative workload measures for each position.

Table 2: Field Services Division Workload

Field Services		Statistics for Purchase Orders processed from 08/01/2006 – 02/28/2007			
Staff Member	Annualized Number of PO's	Actual Number of PO's	Percent of Division PO's	Total Value of PO's	Average Value of PO's
Orlando Martinez	974	686	85%	\$2,467,959	\$3,597
A.J. Abdul-Hakeem	79	56	7%	\$90,792	\$1,621
Rosa Nunez	88	62	8%	\$147,730	\$2,382
Totals	1,141	804	100.00%	\$2,706,481	\$3,366

ETSD IT Procurement Study

OSBM



While the number of annual transactions shown for Orlando Martinez is quite high (974), their level of complexity relative to those handled by the Buyer in the ITBO, Pedro Batista, is relatively low. Orlando's workload when compared to Administrative Officer I, Andrea Murray, from the Radio Division in Workload Table 4, however, appears quite high (974 vs. 349), even though her work may be somewhat more complex. When comparing Orlando's workload to that of employees in other County departments shown in Table 5, it appears high (365 items greater than the highest average value of 609 for Park and Recreation).

Telecommunications Procurement Workload

Within the Telecom Division there are currently three employees that handle purchasing; though all have other responsibilities as well. Specific positions and employees include: Senior Telecom Technician (Claire Da Silva), Operating Systems Programmer (Farid Fernandez) and Operating Systems Programmer (Ernst Privat). The Telecom Division does not have a dedicated procurement professional on staff. Table 3 below shows the relative workload measures for each position.

Table 3: Telecom Division Workload

Telecommunications		Statistics for Purchase Orders processed from 08/01/2006 – 02/28/2007			
Staff Member	Annualized Number of PO's	Actual Number of PO's	Percent of Division PO's	Total Value of PO's	Average Value of PO's
Claire DaSilva	247	174	75%	\$1,652,686	\$9,498
Farid Fernandez	41	29	12%	\$542,614	\$18,710
Ernst Privat	42	30	13%	\$527,065	\$17,568
Totals	330	233	100%	\$2,722,365	\$11,683

The Senior Telecom Technician, Claire DaSilva, is processing the bulk of Telecom's procurement items, although they are of lesser complexity than those processed by the Operating Systems Programmers. The more complex items appear to be evenly distributed between the Operating Systems Programmers and the annualized figure for the Senior Telecom Technician is significantly less than the full-time equivalent workload figures for other County departments in Table 5. On this basis, the workload appears generally well distributed.

ETSD IT Procurement Study

OSBM



Radio Procurement Workload

Procurement items within the Radio Division are handled by one Administrative Officer I position (Andrea Murray). Table 4 below shows workload data for this position.

Table 4: Radio Division Workload

Radio		Statistics for Purchase Orders processed from 08/01/2006 – 02/28/2007			
Staff Member	Annualized Number of PO's	Actual Number of PO's	Percent of Division PO's	Total Value of PO's	Average Value of PO's
Andrea Murray	349	246	100%	\$1,315,778	\$5,348
Totals	349	246	100%	\$1,315,778	\$5,348

Andrea's annualized workload is in line with that of other County departments shown in Table 5.

Other County Departments

To better gauge the relative level of ETSD's procurement workload, comparative data was gathered from procurement units within other large County departments. The annualized ETSD figures used are based on data from August 1, 2006 through February 28, 2007. The comparative data from other County departments is for Fiscal Year 2005-06 and has been adjusted to eliminate positions performing part-time purchasing functions and their items processed. Table 5 below shows generalized workload data for ETSD, Department of Solid Waste Management, Park and Recreation Department and Miami-Dade Police Department.

Table 5: Miami-Dade County Selected Departments Procurement Workload

Department	Dedicated Full-Time Procurement Staff Members	Total Annual Number of PO's Processed by Procurement Staff	Average Number of PO's Processed per Staff Member
ETSD	7	1,981	283
Solid Waste	4	1,214	304
Park and Recreation	12	7,309	609
MDPD	7	2,146	307

As noted earlier in this section, the above figures indicate that a workload disparity exists in the Field Services Division at ETSD.

ETSD IT Procurement Study

OSBM



Florida Counties IT Procurement Comparison

A telephone survey was conducted to compare IT procurement processes and policies in other large Florida Counties with our own. The results of the survey are shown in Table 6 below:

Table 6: IT Procurement Characteristics of Other Large Florida Counties

Florida Counties Surveyed	IT Goals, Policies and Standards Set by Entity Other than IT Dept.	Technical Specifications Prepared by User Departments	Legislation Specific to IT Purchasing	Actively Utilizing Advance Acquisition Planning	Utilization of External Contracts for IT Purchases
Broward		✓			
Duval		✓			✓
Hillsborough	✓	✓	✓	✓	✓
Miami-Dade	✓	✓			✓
Palm Beach	✓	✓			✓
Pinellas	✓	✓			✓

The survey results indicate:

- Several other large counties have established an IT Governance process similar to that now in effect in Miami-Dade County.
- Many large counties rely on user departments to write technical specifications for their solicitations.

[Note: Procurement guidelines for Hillsborough and Pinellas Counties place limitations on the extent to which the purchasing/procurement department can modify technical specifications submitted by user departments].

- Few large counties have legislation specific to IT purchasing.
- Few large counties are actively engaged in Advance Acquisition Planning.
- Many large counties utilize external contracts to make IT purchases.

Conclusion

Miami-Dade County is in line with its peers, while Hillsborough County is particularly progressive and may be a good model for enhancements to the County's IT Procurement Process.

ETSD IT Procurement Study

OSBM



Case Studies

911 Dictaphone Maintenance

911 Dictaphone recording and playback equipment provides the Miami-Dade Police Department Communications Bureau with voice recording of emergency (911) and non-emergency phone lines, as well as public safety radio transmissions. The equipment was initially purchased with only warranty coverage as the mechanism to provide system maintenance.¹ The warranty coverage has since expired. A new maintenance contract is in the development stages, although it has recently been placed on hold due to numerous problems with the equipment and the possibility that the entire system may require replacement in the near future.

Currently, trained Enterprise Technology Services Department (ETSD) staff also provides some support for the Dictaphone equipment, but complex repairs involving hardware components require support by the original vendor, Nice Systems. In these cases, a Radio Division procurement specialist issues a blanket small purchase order in the amount of \$10,000 and charges the maintenance and repair fees against the open purchase order. After services are rendered, the vendor sends a payment invoice to the ETSD Finance Department. The standing purchase order remains open until a total of \$10,000 in maintenance costs have been incurred, at which time a new purchase order is generated to cover future repairs.

In the course of gathering requested documents related to this case study, Radio Division personnel came across a purchase order for additional Dictaphone equipment purchased as part of a system upgrade on June 6, 2005. The purchase order includes a line item description, "Assured Protection Plan (APP): 24 x 7 services support – three years. Support July 1, 2005 through June 30, 2008." It is unclear whether the service support referenced in this purchase order covered the entire system, including existing equipment, or just the upgraded portion of the system.

Conclusions

- Although the use of Small Purchase Orders has been effective thus far in providing maintenance services and ensuring continued operation of the equipment, potential advantages of a contractual relationship, such as maximum response time for repairs and liquidated damages for failure to comply with contract terms are not currently available to ETSD. Depending on the extent of the Assured Protection Plan coverage, ETSD may want to consider pursuing a bid waiver to obtain a System maintenance services contract.

¹ OSBM has been unable to obtain any documentation regarding the date the 911 Dictaphone equipment was purchased and its cost.



- The practice of using multiple small purchase orders for the same service conflicts with DPM Procurement Guidelines, which state that “Each Department’s small purchase orders should not exceed the aggregate amount of \$10,000 for the same goods and/or services during the fiscal year.”

Data Storage Library Maintenance

The County requires a great deal of data storage capacity to electronically store and archive information generated in the course of daily operations. The data is stored in an automated mainframe tape library system (System) that consists of equipment such as tape drives, controllers and the software that manages the System. The System supports critical applications including those used by Judicial Administration, Miami-Dade Corrections and Rehabilitation (MDCR), Water and Sewer Department (WASD), Miami-Dade Police Department (MDPD), as well as the County’s payroll and finance system. Proper System maintenance is essential for continuity of core County functions.

The County originally entered into a maintenance support contract (M12084) for the System in 1995 with StorageTek (STK) and subsequently renewed the contract for five (5) additional years in 2000 (BW6762-4-05-4). The information obtained indicates contract renewal communications between ETSD and DPM did not start until after the contract’s expiration on August 31, 2005. On September 7, 2005, ETSD submitted a contract modification (Contract Mod.) request for a 180 day extension through February 28, 2006, the maximum extension period allowed under Section 17 of DPM’s Procurement Guidelines. DPM approved the Contract Mod. on September 15, 2005 (BW6762-4-06-4). The next indication of activity on the contract renewal occurred on December 29, 2006, when ETSD submitted a second Contract Mod. to add an additional \$10,000 to the existing \$275,000 annual contract allocation. This Contract Mod. provided for issuance of a Purchase Order (POETO600874) to cover System maintenance costs through August 31, 2006; in essence a second 180 day extension of services.

The original 1995 STK services contract took the form of a bid waiver and on February 10, 2006 ETSD sent the CA Unit a bid waiver justification form to initiate development of the new contract. On April 6, 2006, the CA Unit’s review concluded that the required maintenance services could only come from one source, due to the proprietary nature of STK’s tools and products, and on that basis, a sole source purchase was authorized.

Coordination and communication between ETSD, DPM and STK regarding review of the draft contract was sporadic during the April – July 2006 time frame. This led to numerous contract revisions and miscommunications. These issues were largely sorted out at a September 8, 2006 meeting; however, by this time funds in the purchase order had been exhausted. Later, on October 10, 2006, STK informed DPM procurement officials that the

ETSD IT Procurement Study

OSBM



contract documents were no longer valid, because STK had undergone a corporate name change to Sun Microsystems (Sun). A revised contract was not obtained from Sun until March 4, 2007.

Another factor which added significantly to the protracted procurement process was lack of a complete inventory list of items requiring maintenance under a new contract. In September 2006, DPM raised the question of whether the vendor quotes matched the County's System inventory. A complete inventory list was obtained from the vendor and transmitted to DPM in April 2007, a delay of five to six months.

Sun has been providing System maintenance services without a contract since September 1, 2006. Consequently, the County owes Sun a retroactive payment for the period from September 1, 2006 until a new contract is approved by the Board (current estimate approximately \$130,000). In accordance with Administrative Order 3-38, this payment technically falls into the confirmation purchase or "unauthorized purchase" category, although there are extenuating circumstances as described in this case study. Board approval of a confirmation purchase is required if the amount exceeds \$100,000.

Conclusions

- This case study exemplifies the critical importance of Advanced Acquisition Planning in the County's procurement process. An open and constructive discussion between the ITBO and IT Unit regarding the contract renewal, well in advance of the existing contract's expiration date, would have provided an opportunity to resolve the sole source and inventory issues early in the process. The resulting shorter procurement cycle would likely have prevented the corporate name change from becoming a factor in the delay.
- The purchase of System maintenance services since September 1, 2006, without a contract, was not optional on the part of the ITBO, due to the proprietary nature of the STK equipment, and was exacerbated by multiple incremental delays in the procurement process. A retroactive payment in the new contract may be a reasonable alternative to a confirmation purchase in this case.

Radio Antenna Towers: Installation Maintenance and Repair Services

The County's radio antenna towers play a vital role in assisting Miami-Dade Fire Rescue Department and MDPD carry out their missions. Radio communication is made possible by the use of antennas and microwave dishes mounted on radio towers to transmit voice and data via radio frequencies. Currently, there are nine radio tower sites.

Due to a court ruling that prohibited awarding contracts based on race and gender, ETSD's former radio antenna maintenance and repair contract (5917-3/07) was terminated in

ETSD IT Procurement Study

OSBM



January 2005. On the last day of the contract term, ITBO issued an \$80,000 purchase order for future projects and repairs to the antenna towers. Maintenance costs were charged against this purchase order until Radio Division management was no longer satisfied with the vendor's performance and chose to issue an invitation to bid for two projects: (1) Radio Tower Grounding at the Palmetto Rail Yard, located at 6601 NW 72nd Ave., and (2) Re-painting the TCC Radio Towers, located at 6010 SW 87th Ave. (IB8189-0/08; opened on January 19, 2007). Also included in the scope of work for this bid was preparation of antennas for hurricane season and miscellaneous maintenance and repair work. A blanket purchase order, in the amount of \$85,000, was issued against the limited interim contract (BPO ID: ABCW0700967). This purchase order is set to expire on February 28, 2008, the target date for a replacement term contract (Bid No:5917-9/17).

Conclusions

If all goes as currently anticipated, three years will have elapsed between the time the radio antenna maintenance contract was terminated and the time a replacement term contract is awarded. ETSD staff took appropriate action to secure an interim contract solution, however, given the importance of the radio antenna infrastructure to the County, and its vulnerability, a higher priority for obtaining a term contract may have been warranted in this case.

A less complete written record was available to OSBM for review relative to this particular case study, therefore, it is possible that some of the delay in contract replacement was due to mitigating factors outside the control of ETSD.



Findings and Recommendations

The order of the findings below generally corresponds to the priority order of the recommendations list contained in the Executive Summary. Each finding is followed by its associated recommendation(s), which are numbered in accordance with the Executive Summary recommendations list. Some of the findings cover issues that are both internal and external to ETSD's Procurement Model and others relate to multiple issues of varying priority; therefore, the order of the recommendations in this context is not entirely sequential.

Finding: *Interdepartmental Communication and Cooperation*

From interviews with ITBO and IT Unit/CA Unit staff, it is clear that professional interdepartmental communication and cooperation has broken down. Regularly scheduled meetings are not being held; although meetings are held on a case-by-case basis to discuss specific requisitions. This strained relationship is adversely affecting the IT procurement process, as evidenced in the Data Storage Library Maintenance case study included in this report.

Recommendation:

- ETSD and DPM supervisors and managers should exercise appropriate management authority to ensure employees involved in the IT procurement process are working together in a constructive and professional manner (i.e. required monthly interdepartmental meetings facilitated by upper management, group and individual counseling by supervisors, required conflict resolution training, etc.). [OSBM Priority 1]

Finding: *Advance Acquisition Planning*

The DPM Procurement Guidelines state that, "Advance acquisition planning involves DPM, in collaboration with the user departments, reviewing specifications and statements of work to determine that the purpose of the acquisition is clear, and that the minimum requirements are clearly defined and stated in terms of performance and/or functionality when possible. It should also include market research and analysis to determine sources of supply and available solutions in the market place." The remainder of Section 4 of the Guidelines describes how Advance Acquisition Planning (AAP) is the cure for many of the ills that delay the County's procurement process and that DPM is dedicated to implementing it. The Master Procurement Administrative Order 3-38, DPM's 2007-08 Business Plan, and the 2006 and 2002 procurement studies referenced in this report are replete with references to the benefits of AAP. Furthermore, institutions such as the U.S Government Accountability Office (GAO) and Carnegie Mellon University's Software

ETSD IT Procurement Study

OSBM



Engineering Institute have identified and promoted the use of AAP as a Best Practice. Yet OSBM found that AAP is still the exception rather than the rule in Miami-Dade County IT procurement.

AAP is probably the single most effective means ETSD and DPM can employ to prevent delays in the IT Procurement Process. The three case studies included in this report show, to varying degrees, how the lack of AAP can adversely affect seemingly straight forward solicitations and waste limited County resources. The primary impediment to implementation of AAP seems to be a mind-set that there is insufficient time to stop and plan ahead because there is so much work to be done right now. This approach does not take into account that a significant amount of today's workload likely resulted from yesterday's lack of AAP.

Recommendation:

- ETSD and DPM should enter into a formal process, facilitated by OSBM, toward making Advanced Acquisition Planning (AAP) an integral part of the IT Procurement Process. [OSBM Priority 2]

Finding: Technical Specifications

The responsibility for writing clear and accurate technical specifications appears to have migrated from user departments, including ETSD/ITBO, to DPM. The DPM 2007-08 Business Plan states, "DPM has assumed the majority of the specification development functions for a significant number of departments with large purchases and large purchase volumes." During interviews with the IT Unit and CA Unit, it became clear that ETSD/ITBO is included among the group of departments referred to in the Business Plan that are submitting technical specifications requiring significant rework by DPM, which lengthens the procurement process. The DPM Business Plan acknowledges that, "Specification development responsibilities lie within operational departments;" however, the Master Procurement Administrative Order 3-38, Procurement Organization, identifies assembling appropriate specifications, terms and conditions as a responsibility of DPM. This specific policy inconsistency should be resolved and overall technical specification writing responsibility reoriented toward user departments.

Improving technical specification writing skills within ETSD and its user departments is second only to AAP in its potential to facilitate the IT procurement process. Referring to the Organizational Workflow and Approval Path diagram in Exhibit 1A, most procurement items transmitted from the ITBO to DPM originate from either user departments or the operations divisions within ETSD, which provide services for user departments. Both ITBO and ETSD operations division staffs acknowledge that a lack of technical specification writing capability exists in user departments and ETSD as well.

ETSD IT Procurement Study

OSBM



In the past, DPM periodically provided an in-house technical specification writing course for procurement personnel in user departments. Current operational demands, however, do not allow sufficient time availability for DPM staff to teach this course. Departments are encouraged to take the training courses offered by the NIGP. The extent to which departments are utilizing NIGP for training was not included in this review.

Recommendations:

- Ensure that all ETSD staff members responsible for writing technical specifications are properly trained through NIGP or other appropriate means. [OSBM Priority 3]
- ETSD should work collaboratively with its user departments to ensure that all departmental staff members responsible for writing technical specifications are also properly trained. [OSBM Priority 4]
- DPM should propose an amendment to Master Procurement Administrative Order 3-38 to clarify that technical specification development responsibilities lie within operational departments, and departments that write technical specifications will be held accountable for their quality and accuracy; a process for implementing this policy should be included in the DPM Procurement Guidelines. [OSBM Priority 7]

Finding: *Decentralization of ETSD Procurement*

There was unanimity among staff of the Field Services, Radio and Telecom operations divisions interviewed for this study that decentralization of procurement within ETSD has enabled them to provide services to their customers more efficiently. There was general consensus that the \$100,000 cap on purchase approvals within the operations divisions should be increased for budgeted items when there is an adequate allocation on an existing contract; thereby avoiding the ITBO approval requirement.

Recommendation:

- Consider increasing the \$100,000 cap on purchase approvals within the ETSD operations divisions for budgeted items when there is an adequate allocation on an existing contract. [OSBM Priority 10]

Finding: *ITBO Staffing*

When conducting staff interviews, there was consensus among the ETSD operations divisions and the ITBO that the ITBO lacks sufficient staff to assist with the division's needs and those of multiple user departments. Since decentralization of the procurement function within ETSD, which reduced the number of full-time equivalent positions within the ITBO



from nine to four, the divisions have experienced an increasing number of delays in complex solicitations and an inability by the ITBO to respond quickly to division requests. The workload analysis performed for this study was not sufficiently robust to conclusively establish this deficiency using comparative data from other large County departments and one Florida County.

Recommendation:

- ETSD should first implement OSBM recommendations 1-5, and subsequently re-evaluate the need for additional resources within the ITBO. [OSBM Priority 6]

Finding: *Operating Divisions Procurement Staffing*

As discussed in the ETSD Workload Analysis section, there appears to be an excessive number of purchasing transactions handled by a single individual in the Field Services Division. Further, the Telecom Division does not have a trained procurement professional on its staff and may be at a disadvantage with regard to technical specification writing capability.

ITBO staff expressed concern that, due to a lack of resources, they are unable to provide sufficient oversight for procurement activities taking place solely within the operations divisions relative to compliance with procurement rules (i.e. vendor rotation on pool contracts and multiple use of small purchase orders for the same item or service [refer to 911 Dictaphone case study]). OSBM research and analysis in this area relative to lack of resources was inconclusive, however, the appropriate level of ITBO oversight for operations divisions is an issue that bears further review and evaluation by ETSD.

Recommendations:

- Determine the appropriate level of ITBO oversight for procurement activities performed solely within the Field Services, Radio and Telecom operations divisions and ensure necessary resources are available to perform this function. [OSBM Priority 5]
- If feasible, redistribute the procurement workload within the Field Services Division among existing staff or validate the need for an additional procurement professional in Field Services and justify this requested addition to OSBM. [OSBM Priority 8]
- Validate the need for a procurement professional with technical specification writing skills in the Telecom Division and justify this requested addition to OSBM. [OSBM Priority 9]

ETSD IT Procurement Study

OSBM



Finding: *Tracking Expiring Contracts*

The DPM IT Unit appears to lack a fully functioning system to track IT contract expiration dates, based on the data provided to OSBM; however, the ITBO reports that bid review requests from DPM are timely, and the ITBO also keeps track of contract expiration dates on its own spreadsheets. While this approach generally seems to be working, as demonstrated in the Data Storage Library Maintenance case study, sometimes discussions regarding contract renewal begin very late in the process. When this happens, a contract extension is needed to provide sufficient time to prepare and issue a new solicitation. As a final option to extend the service, a final purchase order can be issued just prior to the end of the extension period.

DPM's Balanced Scorecard within the ActiveStrategy Enterprise (ASE) performance management application does not include a measure quantifying the number of contracts within a specified period that expired without a successor contract or alternative means in place for procuring a required good or service. This measure would be a solid indicator of the extent to which progress is being made in the areas of interdepartmental communication, cooperation and AAP.

Recommendation:

- DPM should add an ASE scorecard measure for the number of contracts that expire without a successor contract or alternative means in place for procuring a required good or service. [OSBM Priority 11]

Finding: *ITBO vs. IT Governance Process*

The responsibility for making countywide IT purchase decisions has shifted from the ITBO to the IT Governance Board and IT Leadership Council. The ITBO continues to review IT purchases of other departments, which are identified by commodity code in ADPICS, for their potential impact on enterprise systems, but this review is not guided by a strategic IT plan or set of approved purchasing standards.

Recommendation:

- The term Information Technology Business Office (ITBO) connotes a scope of IT procurement review no longer associated with ETSD procurement. It may also contribute to confusion regarding ETSD's role in the IT Governance Process. ETSD should formally retire the term ITBO and replace it with the often used ETSD Central Procurement Unit or some other more up-to-date identifier. [OSBM Priority 12]

ETSD IT Procurement Study

OSBM



APPENDIX 1
HIGHLIGHTS FROM PAST PROCUREMENT REPORTS/ STUDIES

Three recent reports/studies pertaining to the procurement process in Miami-Dade County are outlined below. Some of the recommendations included in these documents have since been implemented. In some instances, recommendations from these reports/studies are repeated in the recommendation section of this study.

**Procurement Process Improvement Review
Final Report – February 1, 2006**

Purpose:

The report, prepared by DPM, focused on process improvements estimated to reduce procurement cycle times, from receipt of requisition to date of contract award, by 33% to 36% for items requiring Board approval and between 38% and 46% for other items.

Selected Findings and Recommendations: ¹

- Long and slow procurement cycles are largely due to (a) process complexity, (b) poor resource allocation and work assignment methods, (c) duplication of efforts (d) redundant low value-added tasks, and (e) multiple reviews at different stages in the process.
- Conduct “Successor Contract Preplanning” to ensure replacement contracts are in place and cut down on contract extensions, contract modifications, bid waivers and sole source procurements.
- Mandate “Advance Acquisition Planning.” ²
- Allow for County Managers Office approval to advertise all solicitations.
- Departments providing incomplete or flawed documentation to back-up a requisition request in ADPICS results in perhaps the most time consuming part of the procurement cycle.
- Waive all procurement contract awards to the next Board meeting after Committee approval.

¹ – Paraphrased

² – Within the Final Report, the terms *Successor Contract Preplanning*, *Advanced Acquisition Planning*, *Advance Acquisition Planning* and *Advanced Planning* are used somewhat interchangeably, however, these terms appear to encompass two separate and distinct processes - (1) Planning ahead so successor contracts are in place prior to expiration of an existing contract, and (2) Working collaboratively with departments prior to submittal of a requisition to DPM to ensure that specifications are clear, minimum requirements are based in performance and/or functionality and market research is adequate (“Advance Acquisition Planning,” as defined in the May 2006 Procurement Guidelines).

ETSD IT Procurement Study

OSBM



**Analysis of Information Technology
Procurement – January 26, 2004**

The report reviewed the alignment of procurement-related roles and responsibilities in the ITBO and the IT Unit.

Selected Findings and Recommendations: ¹

- Some duplication of effort in the area of market research was identified. OSBM recommended that the IT Unit utilize the market research conducted by the ITBO. This could be accomplished by agreeing in advance on a research approach or having DPM observe the most critical aspects of the research.
- Most “mini” competitions under pool contracts are administered by user departments. The ITBO is a large user of IT pool contracts, but is not the only user. DPM should not become responsible for all “mini” competitions, but should have the responsibility to determine the method of selection and award within pool contracts where price is the only basis for award.
- If new pool contracts are established that utilize both price and quality criteria for contract award, DPM and the ITBO should work collaboratively to determine the appropriate method of selection.
- The merger of the DPM IT Unit and the ITBO, as well as transfer of functions or resources, is not recommended.
- While not the focus of the study, a generally low level of satisfaction with timeliness in the IT procurement process was noted.
- The ITBO should be given the opportunity to review IT-related scopes and specifications for solicitations submitted directly to DPM by user departments prior to advertisement.
- DPM and the ITBO should work together to develop appropriate procedures for atypical purchases particular to IT purchases, such as annual renewal of software licenses.
- DPM and the ITBO should work together on staff training opportunities.

¹ – Paraphrased

ETSD IT Procurement Study

OSBM



**IT Procurement Strategy: Structure,
Function and Methods – September 16, 2002**

Purpose:

Streamline procurement programs and realign and consolidate IT throughout the County by means of innovative, expedited procurement methods.

Selected Findings and Recommendations: ¹

- Create an IT Unit within DPM, which is responsible for formulation, solicitation and award of new contracts for acquisition of IT goods and services requested by the CIO. The team will work with the ITBO to evaluate needs and recommend procurement vehicles. This structure combines the unique ability to integrate both the technical and procedural aspects of IT procurement.
- The ITBO will be responsible for coordinating and prioritizing IT procurement efforts, supporting the IT Unit in the formulation and award of new contracts, and for providing post-award management of IT contracts, including pool contracts, in accordance with DPM guidelines.
- The ITBO should have a cross-functional and highly coordinated relationship with the IT Unit. Due to budget constraints, the IT Unit and the ITBO should agree to share staff from time to time, depending on workload and assignments.
- The IT Unit should work with the ITBO and user departments to guide initial market research and early specification writing to avoid duplication of efforts and unnecessary delays.
- The ITBO should: (1) Be the focal point for IT purchase decisions countywide, (2) Work with the IT Unit to ensure that new contracts address County business needs, (3) Provide the IT Unit with the technical specifications needed to establish new contracts, (4) Encourage departments to work with the ITBO and IT Unit early in the acquisition planning process, (5) Enforce purchasing standards for IT products and services and ensure compatibility in purchases countywide.
- The IT Unit and the ITBO must move toward “strategic procurement” where procurement professionals are not just processing purchase orders, but becoming business consultants, team leaders and project managers. ¹ – Paraphrased

ETSD IT Procurement Study

OSBM



APPENDIX 2
LEGISLATIVE AND POLICY FRAMEWORK FOR
MIAMI-DADE COUNTY IT PROCUREMENT

Presently, there are no Ordinances, Administrative Orders, Implementing Regulations/Orders or Guidelines specific to IT procurement in Miami-Dade County. IT procurement is governed by the same rules and regulations that apply to the procurement of all other goods and services. The legislative sections and policy documents that relate directly to the purpose of this study include:

- **County Charter, Section 5.03, Financial Administration, Subsection D**, which establishes the basic tenants for County contracting by requiring whenever practicable, specifications and competitive bids. The Charter also provides that a threshold amount for sealed bids be established by the Board of County Commissioners by ordinance and allows for waiver of competitive bidding when it is in the best interest of the County.
- **Miami-Dade County Code, Section 2-8.1, Contracts and Purchases Generally**, which contains a threshold amount for sealed bids of \$100,000, contractor and sub-contractor requirements, County Manager’s contracting authority, small business programs, etc.
- **Administrative Order 3-38, Master Procurement Administrative Order**, which establishes that all authorized purchases be made in accordance with Florida Statutes, the Administrative Order and the DPM Procurement Guidelines. Generalized topic areas contained in the Master Procurement Administrative Order include:
 - A policy endorsing Advance Acquisition Planning
 - Designation of DPM as the central agency for the procurement of goods and services and the responsibilities of DPM
 - Timeframes for review of technical specifications by reviewing departments
 - Purchasing methods, purchasing thresholds, types of purchases, County Manager’s/DPM Director’s purchasing authority
 - Small Business Assistance
 - Ethics

ETSD IT Procurement Study

OSBM



- **Department of Procurement Management (DPM) Procurement Guidelines (Revision 6)**, which expands on the Master Procurement Administrative Order by providing detailed guidelines for processing all the various types of procurement items. Generalized topic areas contained in the Procurement Guidelines include:

- Role of the Competition Advocate within DPM
- Advance Acquisition Planning
- Cone of Silence procedures
- Use of local preference procedures
- Appeal and protest procedures
- Formation of evaluation/selection committees
- Rejection of bids/proposals
- Vendor Pool Contracts administration
- Accessing contracts from other government agencies
- Monitoring and reporting vendor performance
- Bonding and insurance requirements
- User Access Program
- Conducting Market Research

[Note: There are many other Administrative Orders, Florida Statutes Sections and County Code Sections not referenced here that relate to, or have some bearing on, the County's procurement process. Only those considered essential for the purpose of this study have been outlined above.]



APPENDIX 3
SELECTED REFERENCES

Departmental interviews

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ETSD: Don Fleming, Jenny Deblois & Shanda Mazzorana
OSBM: Ray Scher & Christa Erml
2. Project Kick-Off – March 8, 2007
ETSD: Jenny Deblois & Pedro Cacicedo
DPM: Linda Leasburg-Kramer
OSBM: Paul Mauriello, Amy Horton-Tavera & John Murphey
3. DPM Director & IT Unit – March 28, 2007
DPM: Miriam Singer, Linda Leasburg-Kramer & Melissa Adames
OSBM: Paul Mauriello & Kevin Kirwin
4. ETSD Central Procurement Unit/ITBO – April 11, 2007
ETSD: Jenny Deblois, Pedro Cacicedo, Mirta Cardoso, Manny Fernandez & Pedro Batista
OSBM: Paul Mauriello & Cara Tuzeo
5. ETSD Telecom Division – April 11, 2007
ETSD: Lars Schmekel, Robert Ashby & Firad Fernandez
OSBM: Paul Mauriello & Cara Tuzeo
6. ETSD Radio Shop – April 11, 2007
ETSD: Felix Perez, Patrick Burke & Andrea Murray
OSBM: Paul Mauriello & Cara Tuzeo
7. ETSD Field Services Division – April 11, 2007
ETSD: Carlos Bianchi & Orlando Martinez
OSBM: Paul Mauriello & Cara Tuzeo
8. DPM Technical Services Division – April 19, 2007
DPM: Linda Leasburg-Kramer
OSBM – Raul Quintero

ETSD IT Procurement Study

OSBM



9. DPM IT Unit – April 20, 2007
DPM: Linda Leasburg-Kramer, Melissa Adames & James Munn
OSBM: Raul Quintero & Cara Tuzeo
10. ETSD Central Procurement Unit/ITBO – April 20, 2007
ETSD: Mirta Cardoso & Manny Fernandez
OSBM – Paul Mauriello & John Murphey
11. DPM CA Unit – April 26, 2007
DPM: Amos Roundtree & Namita Uppal
OSBM: Paul Mauriello & Raul Quintero
12. DPM CA Unit – May 1, 2007
DPM: Namita Uppal
OSBM: Raul Quintero

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- Hillsborough County -
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Palm Beach County Purchasing Department, May 21, 2007
- Pinellas County – Candy Mancuso, Pinellas County Purchasing Department, May 16, 2007

Legislation and Public Policy (by date)

Miami-Dade County Home Rule Charter and Amendment, as amended through January 26, 2007, Section 5.03, Financial Administration

Miami-Dade County Code, Section 2-8.1, Contracts and Purchases Generally

Miami-Dade County, Department of Procurement Management, Procurement Guidelines, May 2006

ETSD IT Procurement Study

OSBM



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Miami-Dade County Master Procurement Administrative Order 3-38, Effective July 1, 2005

Purchasing Policy and Procedure Manual, Pinellas County, Florida, Purchasing Division, January 2005

North Carolina Information Technology Procurement: Policies and Procedures, North Carolina Office of Information Technology Services, January 21, 2000

Additional Documents (by date)

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Enterprise Technology Services Department Business Plan (DRAFT), Fiscal Years: 2007 through 2008, March 5, 2007

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Miami-Dade County, Department of Procurement Management, Procurement Process Improvement Review – Final Report, January 2006

Splitting Demand from Supply in IT, McKinsey on IT, Number 2, Spring 2004, pp. 2-8, David Mark and Eric Monnoyer

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How Government Procurement Must Change, Gartner Research, ID Number: AV-19-7746, April 25, 2003

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ETSD IT Procurement Study

OSBM



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www.gartner.com

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ETSD IT Procurement Study

OSBM

