Proactive IT Procurement: Improving Speed & Reducing Risk

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The Problem

1. Blindsided by procurements
2. Perception of IT as roadblock
3. Vague accountability
4. Poor scaling (small vs. XL!)
5. Opaque metrics

How do you define the problem with IT procurements?
One Possible Model

Buckets, Rubrics, Thresholds and Workflow

It’s one model, it’s a model that has worked well for us to help people understand
The book “Plus! The Standard+Case Approach” & a presentation by Rob England at the Pink16 conference provided the basis for the idea of logically categorizing procurements to improve speed.
Define Your Buckets

Differentiate your procurements
Standard are standard; they are created equal.
As time goes on, add more items to standard.
Standard
Desksops
Laptops
Printers
Phones
Software
etc.

Custom
Hardware
Software
Printers
Consulting
One-offs
Everything else
It’s the custom ones that cause problems.
Rubrics

It’s one model, it’s a model that has worked well for us to help people understand
Rubric Exercise – Part 1

1. Take the stack of cards.

2. Sort them in order of priority (top: most important questions)...try to reach consensus

3. Write in additional questions if necessary and ressort

White, grey, green, orange, blue
Rubric Exercise – Part 2

1. Revise your list to your top 3 items

2. Set aside the Top 3 cards.

White, grey, green, orange, blue
Discussion

• What were your top 3?
• Were there any that were missing?
How CSU Channel Islands tackled this issue
IT Procurement Impact Assessment

http://go.csuci.edu/ITPIA

Fill out a web form, and a rubric calculates an Impact Score behind the scenes
The importance column in the rubric was used as a multiplier for additional weighting, but is currently not used in CI's implementation.
Thresholds & Workflow

How are they connected?
Threshold: Take action based on score

Minimum score = 14
Median = 35
Maximum score = 56
Now that we know questions to ask and how to score, what action do we take?

We take different action for S vs XL procurements.
Threshold & Workflow Exercise – Part 1

1. Each table gets a set of workflow cards

2. Add a workflow card between your Top 3 rubric steps
   1. You can also group rubric steps together and create a workflow.
   2. If you need an extra/different workflow step, write it on the back of the card

3. Write the threshold case at the top of each workflow card
   1. Example: “If Location = Public...” or “Impacts more than 100 students”
Threshold Exercise – Part 2

1. Each table gets test cases

2. Run test case through your rubric

3. Does it work/fit? If not, revise your workflow steps (use blank cards as necessary)

White, grey, green, orange, blue
Sharing Post-Exercise

1. Where did you get stuck? Were you able to find a way out/around?
2. Which cases were easier and which were more difficult?
3. Did you do anything to shortcut or expedite the process? If so, why?
4. Who owns the rubric questions, thresholds & workflow?
5. Who should own the rubric process?
Takeaways

• Building procurement partnerships

• Improving your organization’s sense of procurement scale & impact on IT security & risk

• Constant adjustment

• Bumps and bruises come to light
Q&A

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Our procurement Process:
http://www.csuci.edu/ti/purchasing/