The purpose of this Form is to help Agency Business collect and present initial information about an IT business need. This information will help Agency Procurement and NCDIT collaboratively determine the appropriate approach, resources, and timing needed to deliver the best-value solution to meet the Agency’s business needs. **Agency Business should complete Table 1 of this Form** and either attach it to a Purchase Requisition in NC eProcurement Buyer or provide it directly to Agency Procurement. See bottom of this Form for instructions.

**Table 1: IT Procurement Intake Form** (to be completed by Agency Business)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Summary of IT Procurement Request** | | | | |
| Agency Name | Tap to enter Agency Name. | | | |
| Division Name | Tap to enter Division Name. | | | |
| Requestor Name | Tap to enter Requestor Name. | | Requestor Email Address | Tap to enter Requestor Email Address. |
| Agency Business Owner Name | Tap to enter Business Owner Name. | | Agency Business Owner Email Address | Tap to enter Business Owner email address. |
| Title of IT Need | Tap to enter a concise title that can be used to identify this unique IT business need and any resulting solicitation and contract. | | | |
| Need By Date | Tap to enter the date that the Agency Business needs to have the contract awarded by. | | | |
| Approved Budget / Estimated Base Contract Value | Tap to enter either the acquisition cost of the contract, less extension years, or the Initial Project Cost, less O&M, as estimated in Touchdown. | | | |
| Prior Related Contract References | Tap to enter past awarded contract numbers that are related to this procurement. | | | |
| List of Federal Partners Involved in Procurement Process (if any) | Tap to list any Federal partners that may be involved in reviewing proposed solicitation documents and/or award recommendations. | | | |
| **Details of IT Procurement Request** | | | | |
| Problem Statement | Tap to enter description of the current state of the problem to be solved. Consider the following: What do we do have in place or do now? Current technology? How does it work? Who is utilizing it? How has the requirement evolved; relationship to other projects; why work is needed (what is the problem we are trying to solve for). Summarize information which is essential for understanding the work and ensure technical information is understandable to potential readers of different disciplines. | | | |
| List of Key Features Needed | Tap to enter the required and desired features known at this time. What are the required functions, products, or services? What are the desired functions, products, or services? | | | |
| Description of Market Research Conducted to Date | Tap to describe the market research that has been conducted to date. This could include sources of market information used to conduct the market research, list who is buying similar products/services (e.g., other Divisions in Agency, other State Agencies, other Federal, state, or local governments), what vendors or service providers can meet your Agency’s business needs, to what extent can small and Historically Underutilized Business (HUB) entities satisfy the business needs? | | | |
| If completed at this point, provide link to Completed Privacy Threshold Analysis  NOTE: Go to this [link](https://ncconnect.sharepoint.com/sites/ESRMO-PTA/SitePages/Home.aspx) to complete and submit a Privacy Threshold Analysis | Tap to enter link to completed Privacy Threshold Analysis (if available). | | | |
| Is this procurement associated with an IT Project that has been entered into Touchdown? | Yes  No | I do not know  (To be discussed between Agency PMO & DIT EPMO) | | |
| If an IT Project, enter the Touchdown IT Project Name | Tap to enter the IT Project name exactly as it appears in Touchdown. | | | |
| If an IT Project, identify the Project Manager | Tap to enter PM Name | | Project Manager Email Address | Tap to enter PM Email Address |
| Additional Comments | Tap to provide any additional input for this procurement. | | | |

**Table 2: Procurement Planning Meeting Output Summary** (to be completed by Agency Procurement after discussion with Statewide IT Procurement Office or after the Planning Meeting (if conducted).

|  |  |  |
| --- | --- | --- |
| **Solicitation Development Inputs** | | |
| Commodity Code(s) (go to <https://www.unspsc.org/search-code> to search for applicable codes) | | Tap to enter applicable UNSPSCs. |
| Selected NCDIT Solicitation Template and Terms and Conditions to Use | | Tap to indicate the appropriate NCDIT Statewide IT Procurement Office template that should be used when creating the solicitation. |
| Applicable Agency-specific Terms and Conditions to Use | | Tap to indicate if there are any applicable Agency-specific Terms and Conditions that need to be included in the solicitation. |
| Legal Support Approach (e.g., Agency Legal, Statewide DOJ Legal) | | Tap to document approach to provide Legal support for the solicitation. |
| Historically Underutilized Business (HUB) Vendor Engagement Strategy | | Tap to enter the discussed strategy to help increase the engagement of HUB vendors in the procurement process for this solicitation. This could include conducting a Bidders’ Conference that includes opportunity for HUB vendors to introduce themselves to non-HUB vendor participants to support potential teaming arrangements. |
| Comments | | Tap to document any other material discussion items from Planning Meeting. |
| **Sourcing Project Planned Schedule** | | |
| **Step** | **Task Name** | **Target Completion Date** |
| Step 01 | Submit IT Procurement Intake Form to NCDIT Reviewers for Approval | Tap to enter target completion date for this milestone. |
| Step 02 | Schedule and Conduct Procurement Planning Meeting (optional) | Tap to enter target completion date for this milestone. |
| Step 03 | Submit Draft Solicitation Document for Agency Approval | Tap to enter target completion date for this milestone. |
| Step 04 | Gain NCDIT Approval of Solicitation Document and Sourcing Event | Tap to enter target completion date for this milestone. |
|  | Conduct Federal Review of Solicitation Document (if applicable) | Tap to enter target completion date for this milestone. |
| Step 05 | Open Vendor Responses to Sourcing Event after Response Submission Deadline | Tap to enter target completion date for this milestone. |
| Step 06 | Evaluate Vendor Responses | Tap to enter target completion date for this milestone. |
| Step 07 | Submit Draft Award Recommendation and Leading Vendor Proposal(s) to NCDIT for Review | Tap to enter target completion date for this milestone. |
| Step 08 | Receive Vendor Final BAFO Response (optional) | Tap to enter target completion date for this milestone. |
| Step 09 | Gain NCDIT Approval of Final Award Recommendation | Tap to enter target completion date for this milestone. |
|  | Conduct Federal Review of Award Recommendation (if applicable) | Tap to enter target completion date for this milestone. |
| Step 10 | Execute Contract | Tap to enter target completion date for this milestone. |
| Comments | | Tap to enter any comments related to Planned Schedule. |

Please see below for more detailed instructions on completing and submitting the IT Procurement Intake Form.

1. For IT business needs, Agency Business creates a Procurement Request in NC eProcurement Buyer.
2. Agency Business provides requested information in Table 1 of IT Procurement Intake Form to the best of their ability, knowing that not all information may be known at this time and is subject to change.
3. Agency Business attaches completed version of this entire IT Procurement Intake Form to the Procurement Request created in Step 1 and submits Procurement Request for Agency review. If no Procurement Request is created, Agency Business can provide the completed IT Procurement Intake Form directly to Agency Procurement.
4. Agency Procurement receives Procurement Request with attached IT Procurement Intake Form or directly from Agency Business, works with Procurement Request submitter to address any missing or inaccurate information, and then determines if an existing NCDIT statewide IT term contract or agency contract can address the business need.
5. If no existing contract is able to meet the business need, Agency Procurement creates a Sourcing Project in the NC eProcurement Sourcing Tool and submits the completed IT Procurement Intake Form to NCDIT for review during Step 01 – Identify and Validate Business Need.
6. NCDIT reviewers review the submitted IT Procurement Intake Form and confirm if the IT business need is deemed an IT Project that is required to go through the NCDIT Project Management Process.
7. Agency Procurement should not move forward in the Sourcing Project until NCDIT provides their approval of the IT Procurement Intake Form and there is alignment on if the IT business need is an IT Project or not.
8. A representative of the Statewide IT Procurement Office may reach out to the Agency to discuss the IT business need, review appropriate sourcing options, and collaborate on a schedule of key milestones for the Sourcing Project.
9. Once Agency Procurement receives approval of the IT Procurement Intake Form in Step 01, Agency Procurement can proceed to Step 02 – Conduct Planning Meeting. If Agency Business and Agency Procurement determine it would be beneficial to conduct an optional Planning Meeting with NCDIT to identify options and best approach to meet the business needs, Agency Procurement goes to the IT Procurement Planning Meeting scheduling [site](https://outlook.office365.com/owa/calendar/ITProcurementPlanningMeetingCalendar@ncconnect.onmicrosoft.com/bookings/) and schedules an available 60-minute time slot in the weekly meeting with NCDIT Reviewers on Tuesdays between 4:00 PM and 6:00 PM. Agency Procurement provides Agency Name, a brief description of IT Business Need, and the Sourcing Project Number (e.g., AANNNNNNNNN) for the Sourcing Project in the NC eProcurement Sourcing Tool created for this IT Business Need.
10. Agency Procurement receives Planning Meeting Invitation email with Teams link and forwards the scheduled Planning Meeting invite to applicable Agency staff, including the identified Agency Business Owner for this IT Business Need.
11. Listed below is the recommended Agenda to guide the Planning Meeting:

| **Topic** | **Planned Duration**  **(in minutes)** |
| --- | --- |
| Conduct Introductions | 4 |
| Provide Summary of IT Business Need / Problem Statement / Need by Date | 12 |
| Discuss Options | 20 |
| Select Recommended Procurement Approach | 4 |
| Determine if Agency-Specific Terms and Conditions Apply | 2 |
| Develop Target Schedule, including specific target dates for following major milestones:   * Agency to Submit Draft Solicitation to NCDIT * NCDIT to Provide Approval to Post * Receive Federal Approval to Post (if applicable) * Vendor Initial Responses to Be Submitted * Agency to Submit Leading Vendor Solution to NCDIT * NCDIT to Provide Approval to Award * Receive Federal Approval to Award (if applicable) | 10 |
| Confirm Resources | 4 |
| Discuss HUB Vendor Engagement Strategy | 4 |

1. Agency Procurement documents the outputs from any discussion with Statewide IT Procurement Office of from the Planning Meeting in Table 2 of the IT Procurement Intake Form. This includes estimating the major milestone dates of the IT Procurement Process based on the discussion during the Planning Meeting, which should incorporate the complexity of the procurement, the capacity of agency and NCDIT resources, the time needed for vendors to develop and submit responses, and other applicable factors (e.g., the need for Federal Partner reviews).
2. Agency Procurement uploads the updated IT Procurement Intake Form into the NC eProcurement Sourcing Tool under the applicable Sourcing Project.
3. Agency Procurement adds or updates the ‘Target Contract Award Date’ field in the NC eProcurement Sourcing Tool for the Sourcing Project with the ‘Gain NCDIT Approval of Final Award Recommendation’ date that was mutually agreed upon during the discussion with Statewide IT Procurement Office or during the Planning Meeting. This will be used to help track actual schedule versus planned schedule for the Sourcing Project.