

PUBLIC PROCUREMENT IN THE DIGITAL AGE

Using Technology and Data to Build a
Smarter, More Transparent Future



#SOGF202
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OUR TEAM



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SUPPORTING SUBJECT MATTER EXPERTS

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WHAT WE HOPE YOU TAKE AWAY

By the end of this session, you will be able to:

- Recognize procurement's role in financial planning and stewardship
- Identify key partners and considerations when planning technology purchases.
- Use procurement, contract, and spending data to support informed decisions.
- Consider practical tools for market research, contract oversight, and spending visibility
- Strengthen collaboration between finance, procurement, and program teams

TODAY'S CONVERSATION

- Procurement as a Strategic Ally
- Planning for Technology Purchases
- Smarter Market Research and Sourcing
- eProcurement
- Turning Procurement Data Into Insight
- Contract Visibility, Deliverables, and Compliance
- Practical Examples and Audience Activities
- Key Takeaways and Questions

OUR MISSION

The Division of State Purchasing is a customer-focused team of experts that fosters collaboration and innovation to provide commodities and services to the State of Florida. As Florida's public procurement leader, State Purchasing educates, provides resources, and partners with government entities and vendors to deliver strategic value and achieve successful outcomes. State Purchasing is driven by its passion to serve those who serve Florida, promoting fair and open competition while considering the impact to Floridians first.

WHAT WE PROVIDE

Statewide resources that support informed and responsible public purchasing

Contracts and Agreements

State term contracts, alternate contract sources, and purchasing options

Procurement Guidance

Resources that support compliant and consistent purchasing practices

MyFloridaMarketPlace

eProcurement and vendor information

State Purchasing

Professional Development and Communications

Training, certifications, and learning resources

Data and Transparency

Contract, spending, and compliance information

Eligible User Support

Contract resources, guidance, and assistance

WHO IS IN THE ROOM?

Which area best describes your work?

- Finance or accounting
- Budget
- Procurement or purchasing
- Contract or grant management
- Administration or operations
- Another area

HOW OFTEN DO YOU WORK DIRECTLY WITH PROCUREMENT?

- Every day
- A few times each month
- Occasionally
- Only when something goes wrong
- I am still learning how procurement works

ELIGIBLE USERS



Governmental entities that may be authorized to use certain State Purchasing contracts and agreements

Common Examples

- State Agencies
- Counties and Municipalities
- Special districts and public authorities
- School Districts
- Nonprofit public colleges and universities
- Federal agencies and other governmental entities

Before Using an Agreement

- Confirm that your entity qualifies as an eligible user.
- Verify that the agreement permits eligible user purchases
- Review the scope, vendors, pricing, and ordering instructions
- Follow your entity's purchasing authority, policies, and approval requirements

Eligibility and purchasing authority may vary by agreement. Review the agreement requirements before making a purchase.

WHAT WE PROVIDE TO ELIGIBLE USERS



Eligible users may have access to:

- Competitively procured contract vehicles
- Vetted vendors
- Established terms and conditions
- Negotiated pricing or pricing structures
- Contract documents and ordering instructions
- Procurement guidance and training
- Tools for researching contracts and vendors
- Training certification eligibility

These resources can reduce duplicated work, shorten procurement timelines, and help entities manage cost and risk.

Why Procurement Matters to Finance

Connecting purchasing decisions to financial outcomes

YOUR INVOLVEMENT WITH PROCUREMENT

How involved are you in procurement activities within your entity?

- Procurement is a major part of my role
- I regularly support purchasing or contract decisions
- I review budgets, invoices, or approvals
- I occasionally work with procurement
- I have very limited involvement

At what point does procurement usually become involved in a purchase at your entity?

- During planning and budgeting
- After the need has been defined
- When quotes or a solicitation are needed
- When approval or payment is needed
- It depends on the purchase

THE FINANCE AND PROCUREMENT CONNECTION

Finance helps answer:

- Is funding available?
- Is the cost reasonable and sustainable?
- How will the purchase affect the budget?
- Does the payment match the contract and deliverables?

Procurement helps answer:

- What purchasing options are available, and what are realistic timelines?
- Is there an existing contract that meets the need?
- What process and documentation apply?
- Do the terms protect the entity?
- How should vendor performance be managed?

WHAT COMES TO MIND WHEN YOU HEAR “PROCUREMENT”?

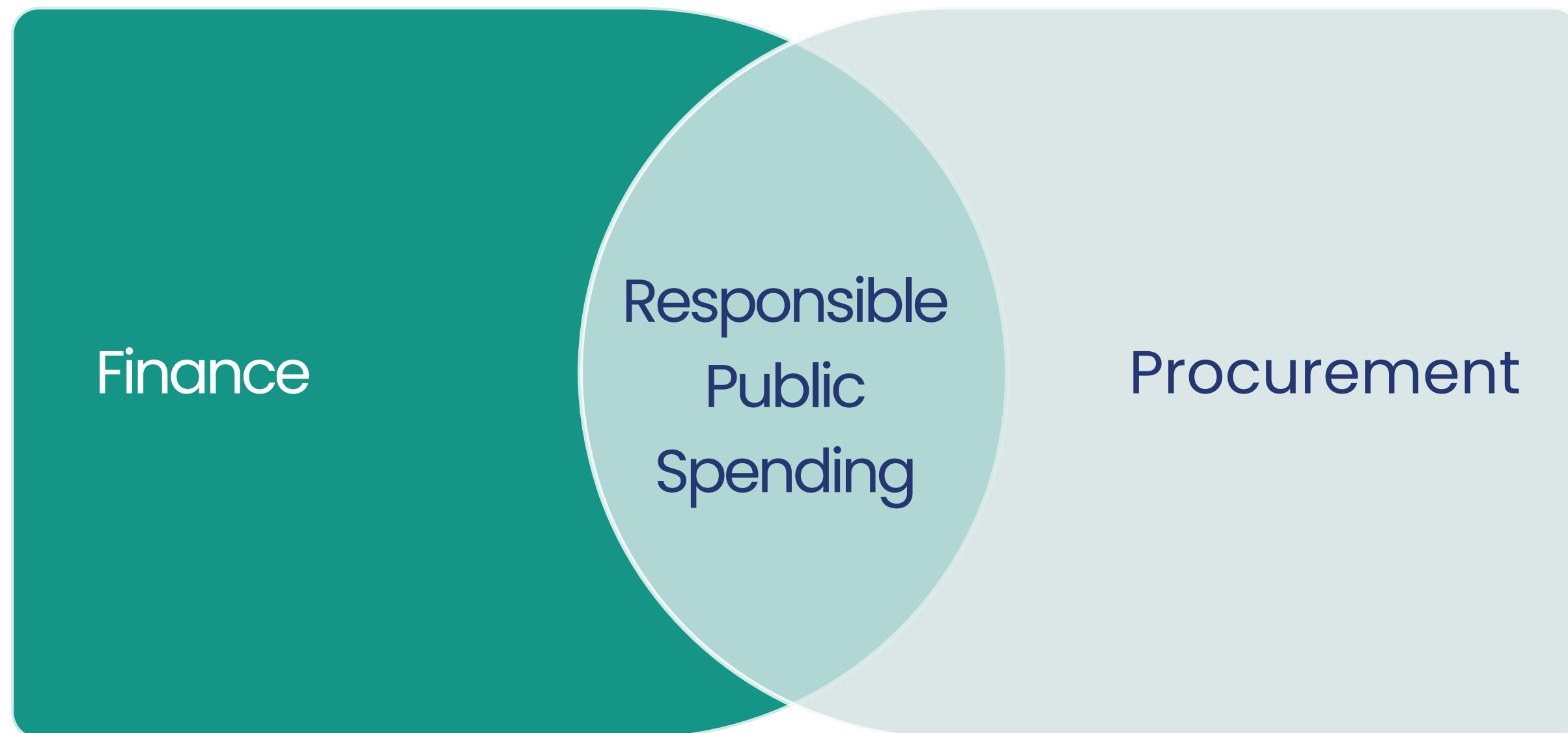
Use the responses to briefly discuss common perceptions, such as delays, rules, approvals, contracts, or paperwork.

Procurement can serve as a resource throughout the purchasing process, especially when brought into the conversation early.

Procurement as a Strategic Ally

Better outcomes begin with early collaboration

FINANCE AND PROCUREMENT SHARE THE SAME GOAL



FINANCE AND PROCUREMENT SHARE THE SAME GOALS

- Responsible use of public funds
- Clear and defensible purchasing decisions
- Reliable vendors and contract performance
- Compliance with applicable requirements
- Services and products that meet the entity's needs
- Stakeholder satisfaction

PROCUREMENT BRINGS MARKET KNOWLEDGE

A powerful partner in risk mitigation

Procurement can help:

- Explore available products, services, and suppliers
- Identify current market conditions
- Understand common pricing and purchasing models
- Determine whether an existing contract can meet the need
- Select an appropriate procurement method

USING AVAILABLE CONTRACT VEHICLES

An existing contract vehicle can provide a faster and more efficient path to purchase when its scope, terms, and pricing meet entity needs.

Existing contract vehicles may include:

- State term contracts (STC)
- Alternate contract sources (ACS)
- Agency term contracts
- Purchasing Consortia

THE VALUE OF VETTED AGREEMENTS

TIME & EFFICIENCY

- Identifies available purchasing paths
- Reduces duplicated research and solicitation work
- Helps prevent delays caused by missing requirements

COST & VALUE

- Provides access to negotiated pricing
- Supports market and prices comparisons
- Considers total cost across the contract period

RISK & COMPLIANCE

- Applies established terms and conditions
- Documents the basis of award
- Identifies contract, vendor, and performance risks

PROCUREMENT ADDS VALUE THROUGHOUT THE PROCESS

Procurement can provide useful information during every phase of the purchase.



EARLY INVOLVEMENT MAKES A DIFFERENCE

Engage procurement when:

- A new need or project begins
- Funding becomes available
- A contract approaches expiration
- The entity plans a technology purchase
- The market or available solutions are unclear
- The purchase may involve significant cost or risk

Planning for Technology Purchases

Understanding the need before selecting the solution

TECHNOLOGY PURCHASING CHALLENGES

What is the biggest challenge when planning a technology purchase?

- Defining what the entity needs
- Understanding available solutions
- Estimating the total cost
- Coordinating finance, procurement, and IT
- Meeting security and compliance requirements
- Managing implementation and adoption

TECHNOLOGY PURCHASES REQUIRE BROADER PLANNING

- A technology purchase may involve:
 - Software licenses or subscriptions
 - Implementation and configuration
 - Data migration and system integration
 - Security, privacy, and accessibility
 - Training and change management
 - Maintenance, support, and renewals
 - Data ownership and contract exit requirements

The purchase price represents only one part of the financial commitment.

THE PLANNING TEAM

Who should be involved in a successful procurement?

Program Team

Defines the operational need and desired outcome

Finance

Confirms funding, budget impact, and ongoing costs

Procurement

Advises on market research, purchasing options, and contract strategy

Technology Need

The problem
we need to
solve

Technology, Security, and Privacy

Reviews system compatibility, integrations, infrastructure, data protection, and technical support

Legal and Contract Management

Reviews terms, responsibilities, deliverables, performance expectations, and contract risks

Digital Service or User Experience

Considers accessibility, usability, and the experience of employees or the public

WORKING WITH THE CIO AND IT TEAM

- Early IT involvement can help the team identify:
 - Compatibility with existing systems
 - Integration and data requirements
 - Security and privacy concerns
 - Infrastructure and support needs
 - Duplicate or overlapping technology
 - Implementation resources
 - Long-term maintenance requirements

BEYOND THE PURCHASE PRICE

Distribute 100 points based on what should receive the most attention when evaluating a technology purchase.

- Categories:
 - Purchase price
 - Implementation costs
 - Security and privacy
 - Integration and data migration
 - User experience and accessibility
 - Vendor support and ongoing costs

TECHNOLOGY PURCHASE PLANNING CHECKLIST

**Before selecting a purchasing path,
confirm:**



- The team has defined the business need
- Finance has identified available funding and future costs
- Procurement has reviewed existing contract vehicles
- The CIO or IT team has reviewed technical requirements
- The team has completed appropriate market research
- Security, privacy, and accessibility needs are documented
- The project includes an implementation plan
- The contract addresses support, performance, data, and exit requirements

Researching the Market and Suppliers

Using data, market insights, and available resources to inform the purchasing strategy

WHERE WOULD YOU START?

Where would you begin when researching an unfamiliar purchase?

- Existing contracts
- Internet search
- Vendor outreach
- Other public entities
- Procurement office
- I am not sure

WHY MARKET RESEARCH MATTERS



Better information supports better purchasing and financial decisions

- Market research helps teams understand:
 - What products and services are available
 - Which suppliers serve the public sector
 - How pricing and service models differ
 - Whether an existing agreement meets the need
 - Which risks may affect cost or performance
 - What purchasing approach may be appropriate

Market information supports realistic budgets, cost comparisons, and planning for implementation and ongoing expenses.

FOUR QUESTIONS MARKET RESEARCH SHOULD ANSWER

The Need

What problem are we solving, and which requirements are essential?

The Market

What solutions, suppliers, pricing models, and contract vehicles are available?

The Risk

What could affect competition, implementation, cost, or supplier performance?

The Strategy

Should we use an existing agreement or conduct a new procurement?

MARKET RESEARCH TOOLS

State Purchasing Website

Use it to find:

- State contracts and agreements
- Contract scope
- Awarded vendors
- Pricing
- Terms and conditions
- Ordering instructions

FACTS

Use it to research:

- Existing state contracts
- Vendors serving other agencies
- Contract values and dates
- Procurement methods
- Commodity and service categories
- Available contract documents

Existing Third Party Tools

- Procurated: Peer reviews of public-sector suppliers
- Procurement IQ: Industry trends, outlooks, and risks
- IBIS World: Pricing, supplier, and negotiation insights

Each tool answers a different question. Use several sources to develop a complete view of the market.

MARKET ANALYSIS AND PROCUREMENT STRATEGY

MAPS documents the research and provides a defensible basis for selecting the purchasing strategy.

Procurement History: What has the state purchased before?

Demand and Spending: Who uses it, how much is needed, and what does it cost?

Market and Suppliers: What solutions, vendors, and pricing structures are available?

Risk and Competition: What could affect participation, performance, or value?

Purchasing Strategy: Which contract vehicle or procurement method best fits the need?

FROM RESEARCH TO A DECISION

Discussion questions:

- Which research findings affect the purchasing method?
- What additional information would finance need?
- Who should help develop the strategy?
- How should the team document its decision?

Market research helps finance and procurement understand the options, estimate costs, evaluate risk, and select a purchasing path supported by evidence.

Cooperative Purchasing

Leveraging shared contracts to save time, expand options, and maximize public value

HOW DOES YOUR ENTITY USE COOPERATIVES?

How often does your entity use cooperative agreements or state term contracts?

- Frequently (first option we explore)
- Occasionally (for specific goods/services)
- Rarely / Never (we usually run our own solicitations)
- I'm not sure

HOW COOPERATIVES STREAMLINE OUTCOMES

Time and Efficiency

- Shortens purchasing timelines
- Reduces duplicated work
- Supports faster project starts

Cost and Value

- Leverages volume pricing
- Reduces administrative costs
- Improves price predictability

Compliance and Risk

- Uses competitively established agreements
- Provides vetted terms and vendor requirements
- Creates a clear, defensible purchasing path

COMMON CONTRACT VEHICLES

Key vehicles available to
local entities include:

State Term
Contracts (STCs)
managed by the
Division of State
Purchasing

Alternate Contract
Source (ACSS)
managed by the
Division of State
Purchasing

Purchasing
Consortia (e.g.,
NASPO ValuePoint,
OMNIA Partners, and
Sourcewell)

Local Entity
Piggybacking (utilizing
competitively
awarded contracts
from other public
agencies)

STREAMLINE THE PROCESS, MAXIMIZE THE VALUE

Save time and reduce duplicated work through cooperative purchasing.

Confirm the agreement fits your needs and purchasing authority.

Review scope, terms, pricing, and eligibility.

Consult procurement professionals before starting a new solicitation.

eProcurement

How electronic procurement can connect technology, budget,
accounting, and purchasing

HOW DOES YOUR ENTITY BUY?

How are most purchases and solicitations processed in your entity?

- Fully electronic system
- Hybrid (digital forms + paper approvals)
- Primarily paper/email-based

BRIDGING BUDGET, ACCOUNTING, AND PURCHASING

eProcurement systems support finance teams by:

- Enforcing budget approval thresholds digitally before orders are placed
- Capturing standard commodity coding for accurate line-item expense tracking
- Maintaining automated audit trails for every requisition and approval
- Supporting accounts payable with electronic receiving and invoice matching

WHY ePROCUREMENT MATTERS TO FINANCE



Better Control, Greater Visibility: Technology Strengthens Fiscal Stewardship

VISIBILITY

- Replaces vague expenses with clear item details
- Identifies pricing differences for identical items across departments
- Tracks spending throughout the fiscal year

EFFICIENCY

- Reduces cycle times for routine purchases and formal approvals
- Connects purchase orders, receiving logs, and invoices electronically
- Supports statutory prompt payment compliance (§ 215.422, F.S.)

ACCOUNTABILITY

- Establishes documented digital audit trails for internal and external audits
- Enforces standard state terms and conditions across all purchases
- Simplifies public records requests and statutory reporting

Turning Data Into Decisions

Using procurement information to support financial decisions

HOW DO YOU USE PROCUREMENT DATA?

How do you currently use purchasing or contract data?

- Budgeting and forecasting
- Reviewing invoices and payments
- Monitoring contract balances
- Planning renewals
- Supporting audits or compliance
- I rarely use procurement data
- I am not sure what data is available

FINANCIAL QUESTIONS PROCUREMENT DATA CAN ANSWER

Spending

- What are we purchasing?
- How does actual spending compare with the budget?
- Which costs are increasing?

Contracts

- What financial commitments have we made?
- Which renewals or expirations may affect the budget?

Payments

- Do invoices align with contract pricing and deliverables?
- Are payments occurring on schedule?
- Are there duplicate or unexpected charges?

Planning

- What phases of the contract incur risk?
- Which future costs require funding?
- Are implementation, maintenance, and renewal costs included?

WHERE THE INFORMATION COMES FROM

Finance may need information from several systems to understand the full financial impact of a purchase or contract.

- MyFloridaMarketPlace (MFMP)
- Florida Accountability Contract Tracking System (FACTS)
- Financial and accounting systems
- Contract management records
- Purchasing card data
- Program and operational records

HOW CAN PROCUREMENT OR CONTRACT INFORMATION SUPPORT IN MAKING FINANCIAL DECISIONS?

Procurement data supports finance teams in forecasting costs, reviewing payments, preparing for renewals, identifying financial risk, and monitoring contract obligations.

Transparency and Contract Oversight

Safeguarding public funds beyond the award

WHAT HAPPENS AFTER AWARD?

How does your entity monitor vendor performance after a contract is signed?

- Dedicated contract managers and structured reviews
- Ad-hoc checks by end-users as invoices arrive
- Primarily when something goes wrong

PROTECTING PUBLIC INVESTMENTS POST-AWARD

Contract oversight protects the entity by:

Verifying deliverables against scope requirements before approving payments

Tracking performance milestones and Service Level Agreements (SLAs)

Preventing scope creep, unauthorized additions, and cost overruns

Managing vendor relationships to resolve performance issues early

CONNECTING CONTRACT TERMS TO THE LEDGER

Payable controls safeguard funds through:

- 3-Way Reconciliation:
 - Matching purchase orders, receiving documentation, and invoices
- Deliverable Sign-Offs:
 - Requiring technical approval before funds disbursement
- Prompt Payment Compliance:
 - Meeting Florida statutory timelines (§ 215.422, F.S.) to avoid interest penalties while enforcing quality
- Contract Amendment Tracking:
 - Ensuring all price adjustments or term changes are formally documented

BUILDING ACCOUNTABILITY THROUGH OPEN DATA

Public Visibility

- Accessible contract and spending data
- Clear documentation
- Responsible use of public funds

Vendor Performance

- Documented performance evaluations
- Fair, consistent contract enforcement
- Supported renewal decisions

Fiscal Integrity

- Early detection of billing errors
- Informed purchasing decisions
- Reduced financial risk

Practical Takeaways

Turning today's insights into action

PRACTICAL STEPS YOU CAN TAKE

- 01 Engage Procurement Early**
Bring procurement professionals into planning before the solution or vendor has already been selected.
- 02 Define the Need**
Clarify the desired outcome, essential requirements, budget, timeline, and risks.
- 03 Research Before You Buy**
Review existing agreements, prior purchases, bid tabulations, available suppliers, and current market conditions.
- 04 Bring the Right People Together**
Include finance, procurement, program, IT, security, legal, and contract management as appropriate.
- 05 Document the Decision**
Record the research, assumptions, costs, risks, and reasons supporting the purchasing strategy.

BUILD YOUR PROCUREMENT NETWORK

You do not have to navigate procurement alone. Connect with internal procurement professionals, State Purchasing, and peers across public entities to share knowledge, identify resources, and make informed purchasing decisions.

RESOURCES TO USE BEFORE YOUR NEXT PURCHASE



Research the History

- Bid summary
- Previous solicitations
- Existing contracts
- FACTS
- Spending and utilization data

Understand the Market

- Supplier research
- Third-Party Research Tools
- Other public entities' contracts and experiences

Evaluate the Agreement

- Scope and specifications
- Pricing structure
- Terms and conditions
- Data ownership and privacy
- Security requirements
- Service levels and performance measures
- Renewals, implementation costs, and exit provisions

Ask for Support

- Your procurement office
- State Purchasing
- IT and CIO professionals
- Security, privacy, and legal teams

CONTINUE EXPLORING STATE PURCHASING



Scan to explore State Purchasing resources

What You Can Find

- Contracts and Agreements
- Eligible User Information
- Procurement Guidance
- Technology Purchasing Resources
- Professional Development
- Tools and Support

WHAT IS ONE ACTION YOU WILL TAKE BEFORE YOUR ENTITY'S NEXT MAJOR PURCHASE?

Procurement is not simply a step in the purchasing process. It is a strategic resource that can help you understand the market, manage risk, protect public funds, and make more informed decisions.

PROCUREMENT IS YOUR STRATEGIC ALLY

Procurement is not a roadblock. It is a strategic ally in protecting public funds, managing risk, understanding the market, and achieving better outcomes.



ACCESS TODAY'S PRESENTATION AND RESOURCES

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the presentation and supporting
materials.**

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**THANK YOU
VERY MUCH**