Clemson Advancement - Vendor Management Process

Clemson Advancement needs to develop a culture where we identify the problem *first* and then propose a solution, which may or may not include the need for a new product. The following steps ensure that Clemson Advancement, and departments supporting the mission of Advancement, adhere to and align with the university's Information Technology Vendor Management Policy. Further, the System Access & Security and Compliance Policy states all software acquisition requests must be submitted to the IT department for review.

Please note the guiding principles that are outlined within the vendor management policy. Initial acquisitions may take 90 days or more due to the amount of time it takes for data governance, IT governance, and legal counsel to review requirements and agreements. Please plan accordingly.

1. **Connect with the CTO:** Share your business need or technical challenge with the Chief Technology Officer to help develop a solution. See if the product or a similar application is already registered with CCIT and then follow this progression.
    a. Utilize existing Blackbaud CRM functionality and the ancillary products we already own.
    b. If the current systems do not meet our business needs, then consider the Blackbaud Marketplace.
    c. If the Blackbaud Marketplace does not meet our business needs, then consider a third-party vendor.

2. **Document the use case:** Provide a brief summary stating the problem with attention toward current state, gap analysis, and ensuring existing policies and procedures are followed.

3. **Share with IT and with leadership:** Share the documentation with Advancement IT and with your leadership. This helps ensure expectations can be met regarding time, resources, and budget.

4. **Discuss with the Data Collaborative:** Work with your data steward to have the product added to an agenda for the Data Collaborative so we can identify stakeholders early in the process.

5. **Vendor Vetting:** Submit the product for vendor vetting and approval with CCIT. If the vetting is approved, complete the Vendor Request for Purchase Form.

6. **Demo:** Schedule a demonstration with the third party and include all appropriate stakeholders. *

7. **Prioritize and scope:** Once the product or application is approved by executive leadership, the project will be prioritized by the CTO on behalf of the Advancement IT team. We will verify stakeholders, identify the scope of work, and document the business requirements outlined in the Change Management form.

8. **Register the product:** Register the product with CCIT to ensure it remains compliant and avoid risks or technical issues. Registration is for products that are already purchased or already in use.

    * *It may be necessary to conduct an initial demo early on to determine if the product accomplishes the intended use case. Be sure that a more extensive demo is provided that includes all appropriate stakeholders.*