Administrative Circular
Commonwealth of Pennsylvania
Governor's Office

Administrative Circular 24-03 – Guidelines to Manage Unsolicited Meeting Requests from Information Technology Vendors

Date: March 4, 2024

By Direction of:

Reginald B. McNeil II, Secretary of General Services

Neil R. Weaver, Secretary of Administration

Contact Agency: Department of General Services
Bureau of Procurement
Telephone: 717.783.1742

Office of Administration
Office for Information Technology
Telephone: 717.787.9945

This circular outlines procedures for reporting unsolicited contact from prospective information technology vendors, management consultants, or lobbyists engaged on behalf of information technology or management consulting prospective vendors.

1.   **Background.**

Commonwealth employees receive unsolicited meeting requests from prospective IT vendors and their lobbyists who seek to do business with Commonwealth agencies. This circular governs the handling of unsolicited contact from information technology (IT) vendors. For the purposes of this circular, an "IT vendor" includes, but is not limited to, any commercial entity that specialize in providing management consulting services, IT products, software, hardware, networking, telecommunications, cloud services, artificial intelligence, cybersecurity, professional services, or solutions. This term also includes, but is not limited to, the entity's employees, agents, sales teams, lobbyists, and any affiliates thereof.

IT vendors seek to pitch their products and services to the Commonwealth as a major buyer of products and services. IT vendors will attempt to secure meetings with Commonwealth employees across state agencies, including senior leaders. However, multiple meetings to market products and services runs counter to the efficiency and effectiveness of Commonwealth operations.

The Commonwealth Procurement Code charges the Department of General Services (DGS) with the responsibility for setting procurement policy for the Commonwealth (62 Pa.C.S. § 311; 71 P.S. § 187). With support from the Governor's Office and the cooperation of the Office of Administration (OA), the Commonwealth will implement this circular, effective February 6, 2024, to more efficiently streamline and strategically consolidate the process by which Commonwealth employees under the Governor's jurisdiction respond to meeting requests from IT vendors and standardize awareness of available products and services in the marketplace.

2.   **Scope.**

This circular applies to all Commonwealth employees under the Governor's jurisdiction, including agency heads, their subordinates, procurement staff, and attorneys. This circular only applies to existing and prospective IT vendors attempting to explore and secure **_new_** business with the Commonwealth. This circular is not intended to affect communications between Commonwealth employees under the Governor's jurisdiction and vendors operating under an existing contract with the respective agency about work within the scope of the existing contract. If an IT vendor operating under an existing contract attempts to communicate about a product or service beyond the scope of the existing contract, Commonwealth employees should follow the guidance outlined in this circular.

3.   **Agencies Under the Governor's Jurisdiction.**

As of the effective date of this circular:

a.   ***Redirect all new unsolicited meeting requests from IT vendors to a single website.*** All Commonwealth employees under the Governor's jurisdiction shall redirect all new unsolicited IT vendor meeting requests regarding new products and/or services with the Commonwealth to a website managed by staff from OA and DGS located at https://qualtrics.pa.gov/jfe/form/SV_8xnH7WmV3YAPhI2. Meetings that were scheduled prior to the issuance of this circular do not need to be rescheduled. Any meeting scheduled after the issuance of this circular must follow the new process. Agency Deputies for Administration shall work with OA and DGS to reinforce this policy within their agencies, including to all employees.

b.   ***Catalog and maintain an inventory of all meeting requests from IT vendors.*** OA and DGS shall maintain an inventory of all meeting requests submitted to the website by IT vendors with the following details:

(1)   Insert text Category of product offered;

(2)   Category of service offered;

(3)   Vendors contact information;

(4)   Dates of outreach; and

(5)   Marketing materials.

c. ***Educate IT vendors on guidelines for future interactions with Commonwealth employees.*** OA and DGS shall share guidelines and procedures concerning IT vendor interactions with each IT vendor that is redirected to the website, including the following information:

   (1) Information on registering as an IT vendor with the Commonwealth;

   (2) Information on where IT vendors can access information on current and future procurements;

   (3) Information on DGS small and small diverse business programs;

   (4) Contact information for DGS; and

   (5) Process for submitting feedback on IT policies.

d. ***Leverage IT vendor inventory to proactively reach out to relevant IT vendors for upcoming solicitations.*** OA and DGS shall collaborate with agency procurement teams to ensure IT vendors receive notification of procurements that may be of potential interest and salience depending on the IT vendor's products or services.

e. ***Organize IT vendor meetings or a forum for IT vendors to showcase their products and services on an as needed basis.*** At the discretion of OA and the appropriate agency, the designated Commonwealth employees will either meet with IT vendors, or if appropriate, DGS and OA shall collaborate to establish "Vendor Days" for IT vendors to showcase their products and services to Commonwealth employees through an in-person or virtual format. These "Vendor Days" will be scheduled based on Commonwealth need and demand rather than IT vendors' offerings. Meetings will occur in accordance with all procurement rules. Employees involved in active procurements or potential prospective procurements shall not meet with IT vendors. No meetings that could potentially disqualify an IT vendor from a future solicitation for work with the Commonwealth should be scheduled.

f. ***Solicit IT vendor feedback on Commonwealth IT Policy.*** DGS and OA shall establish a website https://qualtrics.pa.gov/jfe/form/SV_1HxIzlo5JFKCQlw that will collect feedback from IT vendors on IT policies. IT vendor feedback may be requested on whether policies are written clearly or concisely, whether requirements are clear, and potential improvements to the readability of IT Policy. All suggestions on IT Policy will be considered by the CIO's Office. Just because a suggestion is made – does not mean that suggestion will be enacted. Published COPA IT Policies remain in effect unless and until they are publicly amended or rescinded.

g. ***Document Meetings at Conferences.*** DGS, OA, and other agencies often meet with IT vendors at conferences. Commonwealth employees who meet with IT vendors at conferences should send an email to: RA-OAITVENDORRELATIONS@pa.gov to document those meetings. Commonwealth employees should be careful to abide by all procurement rules when meeting with IT vendors at conferences.

Questions regarding this policy should be directed to RA-OAITVENDORRELATIONS@pa.gov.