

Technology Procurement Strategies

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About This Webinar

- This webinar discusses the strategies for more effective tech procurement. There's a lot of work to do up front before the actual procurement even starts

Tech Procurement in 8 Easy Steps

Pre-Pre-Procurement

- What problem are you solving?
- What does your system look like?
- How do you evaluate options?
- Building organizational capacity

Procurement Setup and Execution

- Writing specs and requirements
- Open data standards in contracts
- Performance metrics & payment
- Vendor dialogue & evaluation

Pre-Pre- Procurement - Define and Rank Problems

- Gather ALL STAKEHOLDERS who the procurement will touch
- Identify Pain Points
 - Practical (How often do you encounter this problem?)
 - Emotional (How does dealing with this affect morale?)
 - Organizational (Who is most affected? What stands in the way of a solution?)

- Turn Pain Points into Problem Statements
 - Problem Statements are mission-related and non-prescriptive
 - Not a problem statement: *"We are still using pencil and paper for demand-response scheduling."*
 - A problem statement: *"Dispatchers can't easily communicate schedule changes to operators; pick-up and drop-off times aren't reliable."*

Define and
Rank
Problems

Rank Problem Statements by Risk: Probability × Impact

Use this matrix to prioritize which problems to tackle first.

Be ruthless in your ranking. Keep the status quo as a real option — don't give change for change's sake an implied boost.

	Low Probability	Medium Probability	High Probability
High Impact		Dispatchers can't communicate changes	Unplanned staff turnover
Medium Impact	Riders waiting for PU info due to call volume	Workstation failure	
Low Impact	Misspelled Pickup Address		Cell network dead zone



Look beyond technology

- When looking for solutions, agencies tend to focus on the lowest-leverage interventions: buying a product, adjusting a parameter, changing a number. Higher-leverage interventions — changing information flows, restructuring decision-making, challenging assumptions — are harder but more effective.

Build knowledge before the procurement begins

- Peers: Ask other agencies about costs, stumbling blocks, and what they'd do differently.
- Vendors: Ask strategic questions: What do your most successful implementations have in common? Where do clients stumble?
- Technical assistance centers: CCAM-TAC, N-CATT, National RTAP, your state DOT. Free technical assistance may be available.
- Requests for Information: Less formal than an RFP. Can spark conversations that aren't possible once you've issued an RFP.

Phase 2: Develop Potential Solutions

Phase 2: Develop Potential Solutions Cont.

Define and build performance measures now

- Collect baseline data: how bad is the problem?
- During tech implementation: are there early indicators of adoption? Are workflows changing?
- After tech implementation: compare to your baseline. Has the problem improved?

Understand the cost of system maintenance

- Many procurements focus on the costs of purchase and implementation; many organizations fail to consider the costs of maintaining a system through its whole life cycle

Ranked problem statements connected to your mission

A transit stack map showing your current systems and pain points

A broad, prioritized set of needs and solutions — what to tackle first, what can wait

Baseline performance measures — how bad is the problem now?

A realistic sense of what you can maintain over time

What You
Take Into
Procurement



WE

DID IT!

On to pre-procurement!

- Be clear about your goals
 - Example: **Basic Function:** APCs will always count passengers, but do you want... this to be used for NTD reporting? certain data analytics for service planning? to show crowdedness levels to passengers?
- Use a requirements table
 - Required: This feature must be done a specific way for program functionality.
 - Essential: This feature must achieve an outcome, but there is flexibility on its mechanism or implementation.
 - Desired: This feature would be nice to have but not critical to functionality.
- Require open data standards whenever possible
 - Interoperability can prevent vendor lock-in and “future proof” your software solution in an evolving market.

Keep Preparing

- Design for tomorrow
 - **Require** open data standards when possible
 - Be specific about integrations **and** software compatibility
 - **Coordinate** directly with partners to ensure products “talk” to each other
 - Ask about data ownership **and** how often you can query/export/download data
- Include industry performance metrics
 - Performance metrics help ensure that you receive the quality product you expect.

And now you start your procurement

- Build in opportunities for vendor dialogue
 - No matter how well-crafted the scope of work, there will be some questions or clarifications — both from the vendor and you. It is essential to build in points for dialogue prior to contract signing to ensure everyone is on the same page from day one.
 - Before: Have your questions answered before you procure.
 - Two ways to do this could be: Request for Information (RFI) or Market Sounding.
 - During: Interviews with vendors can allow you to clarify the product offerings, prices and other key details.
 - *If you want the option to do this, you must include it as a part of the evaluation process in the scope of work. You can make it "optional" or "as needed."*
 - During: Giving an opportunity for clarifying questions to help vendors tailor their response to your needs and provide the most accurate cost proposal possible.

- Request demonstrations and simulations to evaluate
 - Software descriptions tend to sound the same. It can be difficult to discern what will actually work best for you unless you try it out.
 - Demonstrations and simulations are ways to “try before you buy”
 - Demonstrations: polished sales-pitches with canned data
 - Simulations: tailored walkthrough based on your parameters; potential for staff interaction to test

And now you
continue your
procurement



Your State DOT may have (free) technical support for you in addition to other public resources.

State or Organization	Entity/ Department	Link
California	California Integrated Travel Project (Cal-ITP)	hello@calitp.org https://www.camobilitymarketplace.org/
Minnesota	Improving Your Transit Program	https://www.dot.state.mn.us/transit/improving.html
Texas	Transit Technical Services Program	https://www.txdot.gov/business/grants-and-funding/public-transportation-grants/transit-technical-services-program.html
Virginia	Growth & Accessibility Planning (GAP) Technical Assistance	https://vtrans.virginia.gov/about/gap-ta

There are
other
organizations
with resources

State or Organization	Entity/ Department	Link
CTAA	N-CATT	https://n-catt.org/
FTA	National RTAP	https://www.nationalrtap.org/
FTA	SUMC	https://sharedusemobilitycenter.org/
USDOT	ITS- America	https://itsa.org/



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