

## **The Jisc Research Management Systems Dynamic Purchasing System (DPS): bringing transparency to CRIS procurement through an innovative codesign approach**

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This poster will describe the development of Jisc's new Research management systems dynamic purchasing system (DPS) and outline the innovative approach that was used during its development and why the decision was taken to put transparency at its heart.

A DPS is a procurement tool that permits customers to purchase from suppliers who are pre-qualified against a set of requirements. These requirements include due diligence and OJEU requirements, as well as a set of functional requirements specified for the particular DPS in question.<sup>i</sup>

Jisc currently runs a Research outputs repositories DPS<sup>ii</sup>, which is due to end in April 2024. This DPS has proved popular with users, who value both the time saved and the guidance and expertise provided by Jisc staff. During its lifetime the DPS has facilitated contracts totalling more than £750K. As use of the Repositories DPS grew, the team received approaches from a number of UK universities requesting a similar service for procurement of a Current Research Information System (CRIS).

### **Development of CRIS requirements**

The expiration the Repositories DPS has provided an opportunity to develop a new iteration which includes an additional lot for CRISs. During its development, we have taken a design thinking approach to establish the level of demand from the UK sector and to determine a set of functional requirements for CRIS suppliers to meet.

Our approach has taken the form of empathy and validation interviews with a range of stakeholders from UK universities. Our conversations revealed that institutions experience a number of problems when procuring CRISs.

1. The procurement process is time-consuming and results in a large pool of potential suppliers to evaluate.
2. Those leading the procurement experienced difficulties in knowing where to start with the process and due to time constraints and workload.
3. Developing requirements from scratch is challenging, as there are so many stakeholders involved. The result is often an unwieldy set of needs to accommodate.
4. The UK research management systems landscape is dominated by a number of powerful commercial providers, and a lack of transparency about what each supplier provides.

The interviewees' perception was that institutions could benefit from using a CRIS DPS if it:

1. Facilitated an easy process for buyers and suppliers;
2. Reduced timescales for procurements;
3. Provided transparent information about systems and services from suppliers;
4. Provided expert, unbiased support from the Jisc team;
5. Helped to guide thinking and provide reassurance for the university that a number of checks had been already been done (such as due diligence and OJEU requirements).

The most notable finding from stakeholder engagement was that user needs and the systems on offer varied so much that defining a single set of functional requirements to suit all use cases

and systems was not feasible. Because of this, we focused instead on the expressed need from stakeholders for ‘transparent information about systems and services’.

Thus, we defined a small set of mandatory requirements to ensure systems fulfilled the basic functionality of a CRIS. These ensured that their system could record all aspects of research activity, support organisational hierarchies, was compatible with CERIF, enabled interoperability with other institutional systems, and supported internal and external reporting of research information.

In addition to this, we asked suppliers to provide specific information about their products regarding each of the following areas. These answers are for the purchasing institutions’ information only and were not scored.

- Hosting
- Onboarding and exiting
- Customer engagement (including user groups and roadmaps)
- Access and authentication
- Accessibility
- System performance
- Branding
- Data and metadata
- Reporting

### **The final product**

In developing the Research Management Systems DPS we placed an emphasis on transparency and flexibility, rather than prescriptive requirements. The result is a different way of approaching procurement, which seeks to proactively empower the buying institutions.

The DPS enables users to obtain quotes for a CRIS and/or repository from a set of suppliers who are pre-qualified on due diligence, OJEU requirements and a small list of mandatory ‘pass/fail’ functional requirements.

Suppliers have also been asked to provide additional information around a number of core areas of functionality. This enables institutions to make informed decisions by providing them with a framework and starting point from which they can develop and refine their own specific requirements.

### **Who can use it?**

The DPS can be used by Higher and Further Education institutions and Research Council establishments in the UK, as well as any other organisations connected to the Janet network in the UK. It is also available for use by any National Research and Education Network (NREN) and the community it serves where the NREN has either a direct connection to Janet or the NREN is a member (at any time during the period of the DPS) of the consortium that operates GÉANT. All competitions must be conducted in English.

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ii <https://www.jisc.ac.uk/research-outputs-repository-systems-purchasing>