Module 1

Choosing a System and Working with a Vendor or Developer

Welcome to Module 1 of the Data System Improvement Toolkit! If your tribal team wants to develop a new data system or is interested in working with a data system vendor or system developer, this module will be helpful.

Let's start by reviewing some of the terminology in this module. A **data system vendor** is an individual or company that owns and licenses a **commercial off-the-shelf** (COTS) data system/software product. A **data system developer** is an individual or company who is contracted to build or modify a data system. A developer may use or modify COTS software and also work with a vendor. This module contains tools to help your team work with these individuals who are outside of your agency.

In addition, the following terms are used throughout to describe organizations and groups within the modules. **Agency** is the overall organization or entity that oversees your program (e.g., the Urban Indian Health Center, tribe). **Program** refers to the social service, early childhood, or other service organization within the agency. **Team** defines a group of individuals who work together on identifying a new data system for the program.

This module addresses two actions a team interested in selecting a data system needs to do.

Determine whether to use an existing COTS system and, if so, which one.

Many teams face a key question early in their system development process: Is it better to use an existing COTS data system/software product or to develop a new, customized one? The tools will help you (1) make this decision and (2) identify examples of relevant COTS software (if using an existing product is the right choice).

Work with a data system vendor and/or a system developer.

Many teams look outside of their organizations for assistance in designing and developing a data system. Building a strong, ongoing working relationship with a software vendor or system developer begins with clearly communicating your team's expectations, requirements, and staff roles and with understanding the vendor/developer's role, which includes building a new system or supporting your program by customizing an existing COTS system.

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Determine whether to use an existing COTS system and, if so, which one.		
Tool	**Type of tool**	**Description**
1.1: Decision Guide: Is a COTS System Right for You?*	Guide and Assessment	This table guides your team through a series of questions to determine whether various COTS solutions or a custom data system would better meet your program requirements.
1.2: Scan of COTS Systems*	Summary	This tool provides a summary of commonly used COTS products, including those used by tribal and state MIECHV grantees.

Work with a software vendor and/or system developer.		
Tool	**Type of tool**	**Description**
1.3: Request for Proposals – Timeline Guide	Guide *Used with Request for Proposals – Template and Request for Proposals – Timeline Template*	This timeline template identifies the major activities associated with developing a request for proposals. Complete the template by adding vendor or developer activities from the Request for Proposals – Template.
1.4: Request for Proposals – Timeline Template*	Template *Used with Request for Proposals – Timeline Guide and Template*	Once your team has identified a timeline using the Request for Proposals - Timeline Guide, fill out the selected dates on this table. This chart will automatically populate. Add columns to the table to include the staff responsible, notes, or other information.
1.5: Request for Proposals – Template*	Template *Used with Request for Proposals – Timeline Guide and Template*	This template is used by teams looking to hire a system vendor or developer to develop a new data system. Complete the template by adding dates and information from the Request for Proposals - Timeline Template.
1.6: Example of a Data System Software License Agreement	Example	If your team plans to use a COTS system, you will be required to sign a user agreement. This tool walks you through the key elements. Software user agreements with software vendors are typically nonnegotiable, but they contain important language about vendor expectations.

Visit www.tribaleval.org to download individual tools from this toolkit. Those tools marked with an * are available in modifiable forms (Word, Excel, or PowerPoint).