

## Summary

[The Western Interstate Commission for Higher Education \(WICHE\)](#) is a regional interstate compact focused on expanding educational access and excellence for all residents of the West through the promotion of innovation, cooperation, resource-sharing, and sound public policy. WICHE is partnering with the [National Association of College and University Business Officers \(NACUBO\)](#) to produce a toolkit that will equip higher education institutions with a protocol and methodology to identify hidden costs, measure impact, and strengthen relationships across institutions to improve outcomes before, during, and after the procurement process. The work stems from a recognition that enrollment and fiscal pressures demand streamlined and strategic financial decision-making at institutions of higher education.

## Background

Procurement decision-making often happens across the institution in siloes and in the hands of individuals who have varying levels of expertise when it comes to technology systems. The full cost of implementing new tools is not always clear to stakeholders until well after contracts have been signed. Procurement officers often turn to consortia for cost-savings through jointly negotiated contracts and saved time and staff labor; however, institutions often grant purchasing permission to various stakeholders including but not limited to: Chief Technology Officers (CTOs), Chief Information Officers (CIOs), Chief Academic Officers (CAOs), Provosts, and even deans and faculty may hold purchasing power within their own departments. These stakeholders have varying understanding of strategic needs, ad-hoc solutions already in place, or purchasing happening across the institution.

Procurement processes are not always transparent, and not every stakeholder with purchasing power is engaged in strategic budgetary and operational discussions. Stakeholders are often dependent upon vendors to understand the potential value and impact of implementing a technology solution, and challenges with interoperability, customization, and challenges of implementation and maintenance aren't always understood or communicated by third-party vendors. Because technology solutions produced by different companies are not often interoperable, gaps between parallel technology solutions are often ad-hoc or manual, adding considerable hidden cost in labor, time, and efficiency.

## PEAK Toolkit

The proposed toolkit would be called Productivity, Effectiveness, Adoption, and Knowledge (PEAK) Toolkit: A Practical Approach to Technology Return on Investment. PEAK is a toolkit that will equip higher education institutions with a protocol and methodology to identify hidden costs, measure impact, and strengthen relationships across institutions to improve outcomes before, during, and after the procurement process.

The project will engage at least five cross-functional teams from institutions in the [WICHE region](#) who will provide feedback, test, and iterate the toolkit prior to production.

Participating institutions will be awarded \$15,000 for their participation in the project.

Travel support will be provided for two in-person convenings, taking place at the State Higher Education Policy Center (SHEPC) in Boulder, CO.

Proposals must be submitted via [web form](#) by midnight on August 7, 2026.

Questions and concerns should be directed to Olivia Tufo, [otufo@wiche.edu](mailto:otufo@wiche.edu).

## Project Timeline and Milestones

Timing	Activities
<b>July 6-August 7, 2026</b>	Request for Participation
<b>August 7-21, 2026</b>	Selection Committee Review
<b>August 24, 2026</b>	Announcement of Participants
<b>September 13-15, 2026</b>	Project Kick-off in Boulder, CO
<b>October- December 2026</b>	Framework Development and Needs Assessment
<b>January – March 2027</b>	Institutional Application of Toolkit Concept and Iteration
<b>April – June 2027</b>	Institutional Reporting and Feedback
<b>Summer 2027</b>	Final Convening in Boulder, CO Testing Final Toolkit
<b>October 2027</b>	Publication of Toolkit
<b>October 2027 – June 2028</b>	Socialization of Toolkit Evaluation and Determining Future Needs

Institutional teams will be expected to meet with NACUBO and WICHE staff on a monthly basis during the duration of the project. Cross-institutional community of practice calls will also be required periodically.

## Evaluation Criteria

WICHE and NACUBO seek the participation of five institutions for this two-year project. The selection committee will be looking for:

- Five institutions that are distinct in their Carnegie classifications,
- Institutions that have undertaken a significant technology investment in the previous two years,
- Identify cross-functional teams directly impacted by technology investment,
- Institutions that demonstrate leader support for participation in the project,
- Institutions that demonstrate readiness to begin work and capacity for the project within their workplan,
- All participating institutions must be in the [WICHE region](#).

## Submission Guidelines

All submissions for the PEAK Toolkit must be submitted via [web form](#) no later than midnight on August 7, 2026. You will be asked to:

- Identify your cross-functional team (we recommend involving at least one senior leader in finance or technology, and staff across finance, technology, procurement, and a stakeholder with purchasing power but who does not sit in a traditional operational role, such as academic officers, deans, and vice presidents or directors of student success/student life),
- Provide a letter of support from your Provost or President,
- Answer questions about the budget model/financial structure of your institution,
- Answer questions about the leadership structure at your institution,
- Document a recent change-management effort related to a significant technology investment and evaluate the success of the change management project.
- Affirm your availability to travel for the two convenings and up to one conference during the duration of the project (financial travel support will be provided by WICHE).

## RFP Questions

1. Name
2. Title
3. Email and phone number
4. Institution
5. Signed letter of institutional support (President or cabinet member)
6. Identify and provide narrative for a significant technology implementation that your institution has undertaken in FY24 or FY25.
  - a. What went well?
  - b. What went poorly?
  - c. Who were the decision-makers?
  - d. Who should have been at the decision-making table but wasn't?
  - e. If you could change one part of your purchasing or implantation process, what would it have been?
7. Identify up to five key stakeholders who would participate in your working group.
8. Do you have current or forthcoming technological changes coming to your institution in the near future?
9. What is your institution's leadership/cabinet structure?
  - a. Where do the CBO, CTO/CIO sit?
10. What is your institution's budget model? How long has your institution had that model?
11. Affirm that you (the project lead) and up to two team members will be able to travel to the kick-off convening in September 2026 and closing convening in Fall 2027. Financial support for travel will be provided by WICHE.
12. Affirm that you (the project lead) or another team member will be able to travel to at least one conference to promote project findings in FY28. Financial support for travel will be provided by WICHE.