April ITMC – April 5, 2017

Information Technology Procurement Request Process and Policy

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Background

The Information Technology Procurement Request (ITPR) policy and process came about because of the Montana Information Technology Act. MCA, 2-17-505 (2) which states **"It is the policy of the state that the development of information technology resources in the state must be conducted in an organized, deliberative, and cost-effective manner**." Subsection (4)(f) states **"In order to minimize unwarranted duplication, similar information technology systems and data management applications are implemented and managed in a coordinated manner."**

MCA, 2-17-512 (1)(k) **"The department shall: review and approve state agency specifications and procurement methods for the acquisition of information technology resources."** (1)(l) **"review, approve, and sign all state agency contracts and shall review and approve other formal agreements for information technology resources provided by the private sector and other government entities."**

Administrative Rules of Montana (ARM) 2.12.204 discusses the review and approval process for procurement, development, and oversight of information technology resources, software, and management systems. This rule states **"The department may delegate to agencies duties associated with the procurement and oversight of information technology so long as the duties are carried out in conformity with the requirements established in an information technology procurement delegation between the department and state agencies."**

Process and Procedures

SITSD is continuously looking for ways to improve the ITPR process. Under the direction of the State CIO, a Technical Review Board (TRB) was formed to review all IT procurements for the State of Montana. The TRB reviews ITPRs for; business need/justification, cost, alignment with policy and standard compliance, and alignment with agency IT plans. Based on this information the TRB either recommends approval of the purchase, or works with the agency to find another solution.

Soon agencies will be able to view the ITPR log to see what other departments have implemented to satisfy similar business needs. The Approved Software List, ASL.MT.GOV, is online, reviewed quarterly and updated as needed. The ITPR Delegated Authority Guidelines have been updated and provide clear guidelines to what items are within an agencies authority to purchase and report on a quarterly basis. Process improvement is a regular topic at the weekly TRB meets.

Approved Software List Q & A.

The following questions were asked by members of the ITMC.

- How does software get added to this list?
  The TRB makes recommendations for approved software additions and deletions based on a common need across the enterprise.

- Does this list include what versions of a specific software are approved?
  Versioning was removed from the list in order to keep it more current. Agencies are encouraged to stay current with all software.

- Who is responsible for approving the software on this list?
  The TRB is responsible for approving software to be added or removed.

- What is the purpose / intent of the list?
  The approved software list gives agencies quick access to software that has been vetted and satisfies a common need across the enterprise.

- How often is it updated?
  The approved software list is review quarterly and updated as needed.

Note

Quarterly Agency IT Procurement Logs are to ITRequests@mt.gov by April 10

Exception Requests are part of the Policy process and all exception requests should be sent to the SITSD Services Desk.

Additional Resources

MCA, Title 2, Chapter 17, Part 5. Information Technology -- Internet Privacy

Administrative Rules of Montana (ARM) 2.12.204

Information Technology Procurement Request Policy

Information Technology Procurement Request Delegated Authority Guideline

Approved Software List

IT Procurement Request Form