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|  | Montana Operations Manual Guideline | Category | Acquisition, Information Technology |
| | | Effective Date | 06/03/2009 |
| | | Last Revised | Not Approved Yet |
| Issuing Authority | Department of Administration State Information Technology Services Division | | |
| GDE-Information Technology Procurement Request (ITPR) Delegated Authority Guideline | | | |

I. Purpose

The State Procurement Bureau (SPB) and the State Chief Information Officer (CIO) issued these guidelines to assist agencies in the use of delegated purchasing authority for information technology (IT) procurements.

II. Scope

This guideline applies to all state agencies, subject to the exemptions in 2-17-516, MCA and 2-17-546, MCA.

III. Agency Roles & Responsibilities

- A. Agency Director: The department head of an executive branch agency or organization shall comply with terms and conditions of the agency's delegated purchasing agreement and this guideline.
 - 1. Agencies must comply with all Title 18 procurement laws and practices and terms of the delegation agreement as clarified by these guidelines.
- B. Procurement Delegation Liaison: The procurement delegation liaison, as identified in the State Procurement Bureau (SPB) Procurement Delegation Agreement, shall perform the agency review; ensure the IT procurement conforms to state policy, standards, plans, and architectures; and submit the log of IT activities and procurements to SITSD.
- C. State Information Technology Services Division (SITSD)
 - 1. Information Technology Procurement Requests (ITPR) must be submitted to SITSD's Technical Review Board (TRB) for review and approval.
 - 2. The CIO or designee must review and sign all IT contracts, in accordance with ARM 2.12.204.
- D. See POL-Information Technology Procurement Request Policy and PRO-Information Technology Procurement Request Procedure for basic information on the ITPR and TRB processes.

- E. Refer to sections 2-17-512, 2-17-518, and 2-17-524, MCA, and ARM 2.12.204 for additional information on IT procurement authority.

IV. Process

- A. ITPRs must be submitted to SITSD for review and approval for all IT procurements except when an ITPR is not required under the POL-Information Technology Procurement Request Policy.
- B. All IT procurements under the agency's delegated authority must be logged. A FRM-Quarterly Agency IT Procurement Log Form shall be submitted to SITSD by the 10th of the month following the end of a quarter (January, April, July, and October). See Appendix A for information that the procurement log must include.

V. References

Note: *General information about roles and responsibilities, enforcement, references, and other material applicable to all IT instruments is provided in the POL-Information Technology Reference Policy.*

A. Legislation

- 1. Section [2-17-512, MCA](#)
- 2. Section [2-17-518, MCA](#)
- 3. Section [2-17-524, MCA](#)
- 4. [Title 18, chapter 4, MCA](#) (Montana Procurement Act)

B. Executive Orders and Administrative Rules

- 1. State of Montana [Executive Order No. 09-2016](#)
- 2. ARM 2.12.204: [Review and approval process for procurement, development, and oversight of information technology resources and software and management systems.](#)
- 3. SPB Administrative Rules: [ARM Title 2, chapter 5](#)

C. Policies and Procedures

- a. [POL-Information Technology Procurement Request Policy](#)
- b. [PRO-Information Technology Procurement Request Procedure](#)
- c. SPB Policies in the Montana Operations Manual: [Procurement](#)

D. Forms and Other References

- a. [FRM-Quarterly Agency IT Procurement Log Form](#)
- b. [State Procurement Bureau Website](#)

Appendix A Agency Log Format

The FRM-Quarterly Agency IT Procurement Log Form data fields shall include:

- A. Agency name
- B. Agency Contact who approved the request
- C. Date approved (approved by the agency)
- D. Description of Product
 - E. Manufacturer
 - 1. Reseller
 - 2. Quantity
 - 3. Maintenance term
 - 4. PO/Invoice #
- A. Cost
- B. Agency Review category
 - 1. PC and Peripherals
 - 2. Embedded device
 - 3. Education
 - 4. Accepted software
 - 5. SITSD assigned ITPR number for related procurements previously approved, by SITSD

FRM-Quarterly Agency IT Procurement Log Form shall be submitted to SITSD by the 10th of the month following the end of a quarter (January, April, July, October)

Example:

| Agency Name: | | | | | | | | | | | | |
|-------------------------------|---------------------------------------|------------|---|-----------|-----------------|--------------|--|--|--|--|--|--|
| Agency Contact: | | | | | | | | | | | | |
| Period being Reported: | | | | | | | | | | | | |
| Product Description | Category (Select from Drop-Down List) | Reseller | Maintenance Terms (Length of contract or N/A) | Quantity | Total Cost | PO/Invoice # | | | | | | |
| <i>Example</i> | <i>Approved Software</i> | <i>SHI</i> | <i>36 months</i> | <i>10</i> | <i>\$100.00</i> | <i>1234</i> | | | | | | |
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