PROCUREMENT POLICY

Policy Statement

The Office of the Chief Information Officer’s (CIO) role in the procurement of technology for Southern Miss includes:

- Provide technical guidance and assistance in complying with legal requirements of state purchasing laws as they apply to information technology
- Maximize competition between technology manufacturers and service providers
- Leverage the university's combined purchasing power to provide the best possible discounts
- Provide standard technology throughout the university to ensure a reduction in the overall cost of ownership as well as regulatory compliance

Reason for Policy/Purpose

This policy is required for the effective communication of university policies regarding procurement of technology equipment, software and services.

Who Needs to Know This Policy

All university employees who purchase technology equipment, software and services.

Website Address for this Policy

www.usm.edu/institutional-policies/policy-acaf-it-019

Definitions
Telecommunications equipment, systems, and related services

the equipment and means to provide telecommunications transmission facilities; telephone systems, including voice processing systems; facsimile systems; radio paging services; satellite radio, telephone, and dispatch services; mobile telephone services, including cellular mobile telephone services; intercom and paging systems; video teleconferencing systems; personal communications networks and services; and any and all systems based on emerging and future telecommunications technologies related to any of these devices or services.

Policy/Procedures

The Mississippi Department of Information Technology Services (ITS) was established to improve long-range planning coordination and establish a central point of responsibility for the fiscal management of data processing functions in the state. The primary purpose is to maximize the use and benefit of IT by promoting coordination, cohesive planning and maximum compatibility among institutions of higher learning as well as other state agencies.

ITS has appointed the Chief Information Officer (CIO) at the state universities as the designated ITS liaison and approver of technology procurement up to certain thresholds.

Please note that, unlike public purchasing law, the statute that defines ITS and the Office of the CIO purview over technology acquisitions includes services. All technology services, whether for direct, hands-on skills such as application development and network support, or for such technology consulting services as technology training (both classroom and on-the-job), technology studies, project management, technology advisory roles, quality assurance support, and facilities management, are within the Office of the CIO’s purview.

The following items that need be coordinated through the Office of the CIO prior to purchase include but are not limited to:

1. **Information Technology Equipment, Software, and Services**
   Section 25-53-3 of the Mississippi Code of 1972 defines ITS and the Office of the CIO authority over the acquisition of any information technology, computer or telecommunications equipment, electronic word processing and office systems, or services utilized in connection therewith, including, but not limited to, all phases of computer software and consulting services and insurance on all state-owned computer equipment. Acquisition of computer or telecommunications equipment or services means the purchase, lease, rental, or acquisition in any other manner of any such computer or telecommunications equipment or services.

2. **Global Positioning System (GPS) and Navigation devices**
   The Global positioning System (GPS) is a U.S. space-based radio-navigation system that provides reliable positioning, navigation, and timing services to civilian users. For anyone with a GPS receiver, the system provides location and time.
ITS and the Office of the CIO want to emphasize the fact that it does have purchasing purview over GPS and navigation devices under the following conditions:

- When the GPS and navigation capability is integrated into a PocketPC or WinCE product
- When the GPS and navigation capability is integrated into a Palm OS device
- When the GPS and navigation capability is integrated into a Linux PDA device
- When the GPS and navigation capability is integrated into a Blackberry
- When the GPS and navigation capability is integrated into a smart mobile device running on the Symbian OS

3. Internet and Application Service Providers

Internet Services Providers and Applications Services Providers are subject to ITS and the Office of the CIO oversight. These services include but, as technology evolves, are not limited to the following examples:

- Internet access and related services packaging
- applications and database hosting/processing
- website development, content management and hosting
- email hosting; equipment co-location services
- data back-up and recovery services
- disaster recovery services
- business continuation services
- network operations center services
- electronic payment processing
- systems and security administration
- line of business outsourcing such as electronic reservations management, help desk and/or license sales
- related outsourced IT services

4. Printers/Copiers

ITS and the Office of the CIO has jurisdiction over the procurement of stand-alone and networked printers, while the Department of Finance and Administration, Office of Purchasing and Travel (DFA/OPT) is responsible for the purchase of copiers. As multifunction devices have become available, the line between equipment under ITS and the Office of the CIO purview and equipment under OPT purview has become less distinct. ITS and DFA/OPT monitor this technology convergence and its impact on the ITS and DFA customers and procurement approach.

Customers may purchase devices whose primary function is copying from DFA state contracts. If the device purchased from the DFA contract will be networked and the total purchase price is over $250,000 (or if the total cost for the term of a lease is over $250,000), the customer must submit an Exemption Request for ITS and the Office of the CIO approval. This process ensures that ITS and the Office of the CIO are aware of purchases of large networked print devices that will potentially need to interface with the State and/or university Data Center.
Devices that are purchased to function primarily as network or stand-alone printers may be procured through the ITS Express Products List (EPL) or through a procurement request to the Office of the CIO.

5. Document Imaging and Management
Document imaging and management systems scan, store, index, and retrieve documents and other business data electronically. Documents are converted to digitized images, typically via a document scanner. Standard components of document management systems include document capture, document storage and archiving, document indexing and retrieval, document exporting capability, and security to protect documents from unauthorized access.

Document imaging and document management, including hardware, software, imaging services, and/or any other related consulting services, are within the purview of ITS and the Office of the CIO.

Equipment and services for analog methods of data imaging and retrieval, such as microfilm, are not.

6. Management Consulting Contracts
Procurements of consulting services for a study that is the initial phase of an application development project, for functional or conceptual systems design, data modeling, network design, network security, and technology infrastructure recommendations are examples of consulting contracts that require ITS and the Office of the CIO approval.

Other consulting studies, such as business process reengineering, process analysis, and general management studies, may fall under the purview of ITS and the Office of the CIO or of the Personal Services Contract Review Board (PSCRB), depending on the specific project deliverables.

If the study's primary focus is technology, the services should be procured through ITS and the Office of the CIO.

If the primary deliverable from a management consulting contract is a report in which recommendations of technology are included but are not the primary component, the services may be procured through the Office of the CIO or the PSCRB, at the customer's discretion.

If the customer is uncertain whether ITS and the Office of the CIO approval are required for a specific project, the customer may contact the iTech Help Desk at (601) 266-HELP (266-4357) and/or may submit an Exemption Request to the Office of the CIO for written documentation that the specific project does not require approval.

7. Donations and Gifts of Information Technology
Recipients of donations and gifts of older information technology near or at the end of their life-cycle should assess the cost of the items received in terms of usefulness relative to newer technology. Many older technology items are more costly to uninstall, relocate, reinstall, operate, and maintain than new equipment of the same type.
A donation or gift requires ITS and the Office of the CIO approval if the costs of installing, operating, and supporting the equipment exceed amounts delegated to the recipient under the Delegation of Approval Procedure. ITS and the Office of the CIO will be glad to assist in assessing the value of donations and gifts of information technology on request.

8. Other Examples of Procurements Under the Office of the CIO Purview
Equipment or services for a specialized application whose primary function or purpose is other than information technology and for which any computer chip or telecommunications component is secondary or incidental to the equipment’s primary function are outside the purview of ITS and the Office of the CIO.

See 001-030 Exceptions to ITS Purview (available at http://dsitspe01.its.ms.gov/its/procman.nsf/TOC4?OpenView) for a list of some specific items that do not require ITS and the Office of the CIO approval and for instructions on obtaining confirmation regarding ITS and the Office of the CIO purview for a specific procurement.

State statute establishing ITS and outlining the duties and responsibilities of the agency is found in Mississippi Code Section 25-53-1, et seq. Lexis Publishing is the official publisher of the Mississippi Code, which can be accessed through the Secretary of State’s website: http://www.sos.state.ms.us/pubs/MSCode/. A summary of ITS statute is found in the Procurement Handbook under 001-050 Summary of ITS Statute.

The acquisition of information technology for all institutions of higher learning (IHLs) is within the scope of the ITS law and the policies and procedures established in accordance with this statute. ITS law and policy cover the procurement of all information technology hardware, software, and services by state agencies and IHLs. State agencies and institutions of higher learning are required by law to follow ITS procedures in information technology procurements.

For many acquisitions, IHLs must obtain ITS and/or the Office of the CIO approval prior to initiating a purchase. For other acquisitions, ITS has delegated responsibility for technology purchases to institutions according to specific guidelines. Please review the 015-020 Procurement Limits Policies: IHLs for further information.

The following forms are available for ITS and the Office of the CIO procurement process:
- Sole Source
- Bid Procurement
- Emergency Purchase
- Exemption to Bid

**Review**

The Chief Information Officer is responsible for the review of this policy every four years (or whenever circumstances require immediate review).
History

1. 02/20/12: Formatted for Institutional Policies website.
2. 02/19/13: Formatted for template. Minor editing of punctuation and usage throughout.

Amendments: Month, Day, Year – summary of changes
Authorization

PROCUREMENT POLICY
ACAF-IT-019

As the Responsible Officer, I have reviewed this policy and believe it represents the current policy.

____________________________________  _______________________
Responsible Officer                          Date
Authorization

PROCUREMENT POLICY
ACAF-IT-000-019

As the Responsible Officer, I have reviewed this policy and believe it represents the current policy.

[Signature]

Responsible Officer

4/16/13
Date