PROCUREMENT PROCESS

Policy Statement

The University of Southern Mississippi and all institutions of higher learning are required by law to follow ITS procedures for information technology procurements. For many, technology acquisitions, hosting services, IT projects and consultants must obtain ITS and IHL approval prior to initiating a purchase. Fortunately, ITS has delegated compliance responsibility for technology purchases between $5,000 and $250,000 to the IHL CIO’s. All technology purchases over $250,000 must go through IHL and ITS for approval.

Reason for Policy/Purpose

This policy is required for the effective communication of university policies regarding information technology procurement.

Who Needs to Know This Policy

All university employees who procure information technology.

Website Address for this Policy

www.usm.edu/institutional-policies/policy-acaf-it-020

Definitions

Policy/Procedures

Acquisitions within ITS/CIO purview include, but are not limited to:

- Information Technology Equipment, Software, and Services
- Global Positioning System (GPS) and Navigation devices
- Internet and Application Service Providers
- Printers/Copiers
- Document Imaging and Management
- Management Consulting Contracts
- Computer Networks
- Phones (Telecommunication Systems)
- Computer/Network Security

Acquisition of technology products (hardware, application software) and/or services greater than $50,000 are required to be fulfilled through a competitive bidding process unless the products can be procured through the ITS Express Products List (EPL). In this case, only the approval of the CIO is necessary.

The Process

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Summary</th>
<th>Time Frame (Worst Case Est)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Submit a Technology Services work order</td>
<td>n/a</td>
</tr>
<tr>
<td>2</td>
<td>A Technology Services (iTech) representative contacts the department/customer to gather requirements and develop expectations (Project Request Form). Information sought includes, without limitation, does the request include EPL products, are there existing or similar products at the university, is there volume licensing, is a funding source established, what is the expected costs, does the request have VP approval.</td>
<td>2 hrs</td>
</tr>
<tr>
<td>3</td>
<td>The Project Request Form is submitted for Project Prioritization Committee</td>
<td>1 wk</td>
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<tr>
<td>4</td>
<td>A detailed assessment including a business case and/or business requirements (BC/BR) is developed</td>
<td>Based on Scope</td>
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<tr>
<td>5</td>
<td>For projects greater than $50,000, build an RFP</td>
<td>2 days</td>
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<tr>
<td>6</td>
<td>Advertised for proposals</td>
<td>4 wks</td>
</tr>
<tr>
<td>7</td>
<td>Bids are evaluated during the Bid Review meeting</td>
<td>1 wk</td>
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<tr>
<td>8</td>
<td>Contract review by Procurement Director/University Legal Counsel</td>
<td>TBD</td>
</tr>
<tr>
<td>9</td>
<td>For Projects greater than $250,000</td>
<td></td>
</tr>
<tr>
<td>10.0</td>
<td>For projects greater than $250,000 and less than $1 million, get ITS Exec Dir approval</td>
<td>4-8 wks</td>
</tr>
<tr>
<td>10.1</td>
<td>For projects greater than $1 million, get ITS Board approval</td>
<td>4-8 wks</td>
</tr>
<tr>
<td>10.2</td>
<td>If an individual contract is greater than $250,000, IHL approval is necessary with ITS’s recommendation (Bid responses are required)</td>
<td>4-8 wks</td>
</tr>
</tbody>
</table>
Review

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

Forms/Instructions

N/A

Appendices

N/A

Related Information

N/A

History

1. 02/20/12: Formatted for Institutional Policies website.
2. 02/19/13: Name changed from PROCUREMENT SUMMARY to better reflect purpose. Formatted for template. Minor editing of punctuation and usage throughout.

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

PROCUREMENT PROCESS
ACAF-IT-000-020

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

[Signature]
Responsible Officer

[Signature]
Date
4/16/13