

PRESTON L. DOERFLINGER  
DIRECTOR AND SECRETARY  
OF FINANCE AND REVENUE



MARY FALLIN  
GOVERNOR

STATE OF OKLAHOMA  
OFFICE OF STATE FINANCE

**INFORMATION TECHNOLOGY AND TELECOMMUNICATION PROCUREMENT INFORMATION MEMORANDUM 01 (ITPIM-01)**

TO: All Certified Procurement Officers

DATE: December 23, 2011

SUBJECT: New Procurement Procedures for Information Technology (IT) and Telecommunication (Telecom) Acquisitions

**Summary**

Mr. Alex Pettit is the Chief Information Officer (CIO) for the State of Oklahoma. The CIO has the statutory responsibility and shall act as the IT and Telecom Purchasing Director for all State Agencies. Therefore references in this document to the State's CIO and the Information Services Division (ISD) State Purchasing Director are the same position. The (ISD) State Purchasing Director is responsible for the procurement of all information technology and telecommunication software, hardware, equipment, peripheral devices, maintenance, consulting services, high technology systems, and other related information technology, data processing, telecommunication and related peripherals and services for all state agencies. [62 O.S. (2011) § 34.11.1 (H)]

For IT and Telecom Procurement, references in the Oklahoma Administrative Code (OAC) 580 to the "State Purchasing Director" include the ISD State Purchasing Director. Therefore, OAC code 580 references to the State Purchasing Director under headings such as: Bid Withdraw, Contract Award, Supplier's Protest, State Agency Acquisitions, Statewide Contracts, Supplier Disputes, etc.; include the ISD State Purchasing Director. Where formal submission of documents to the ISD State Purchasing Director is required under OAC 580, agencies should submit documents to [purchasing@osf.ok.gov](mailto:purchasing@osf.ok.gov).

Beginning January 1, 2012 all IT and Telecom-related procurement must come through the CIO / ISD State Purchasing Director's office. Agency procurement personnel will need to send all IT and Telecom purchase requests to: [purchasing@osf.ok.gov](mailto:purchasing@osf.ok.gov).

**Relevant Legislation – Information Technology Consolidation and Coordination Act**

No agency shall expend or encumber any funds for the purchase, lease, lease purchase, lease with option to purchase, rental or other procurement of any information technology assets without the prior written approval of the CIO [62 O.S. (2011) § 35.4 (A)]



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In addition, no state agency shall initiate or implement an information technology planned project without the prior written approval of the CIO [62 O.S. (2011) § 35.4 (B)]. This means that ISD approval should always be obtained in advance of initializing the project. If you submit a request for approval after the effective date of the contract/purchase order, the request could be denied and a settlement agreement could be required.

**Instructions**

**Plan Approval Process**

Unless specifically directed otherwise, agencies may continue to procure IT and Telecom-related acquisitions in accordance with their existing statutory procurement threshold. However, all IT and Telecom purchases will need to be reviewed prior to purchasing. This should be accomplished by submitting an OSF Form 115 ([http://www.ok.gov/OSF/OSF\\_Forms/Information\\_Services\\_Forms/](http://www.ok.gov/OSF/OSF_Forms/Information_Services_Forms/)) with supporting documentation (to the purchasing email address above) in accordance with past procedures. The following ***applicable*** supporting documentation must be included; the agreement or contract, terms, specifications, sole source, non collusion, the completed form 115, scoring tool or evaluation method, VPAT, the requisition or purchase order, and the vendor quote(s). Other documentation may be requested as needed for processing.

Requests for exceptions to IT or Telecom Statewide contracts should be submitted to the Contracting Officer indicated. We are working as quickly as possible to update the statewide contracts page on the Central Services website with revised (ISD) contracting personnel information. After January 1, 2012 this information should be updated and posted on the Central Purchasing Website. If after January 1, 2012, you have an IT Telecom Statewide Contract question, and are unable to find the appropriate information, you may contact the OSF/ISD helpdesk at [helpdesk@osf.ok.gov](mailto:helpdesk@osf.ok.gov).

OSF may make comments and recommendations on the approved Form 2133. However, your agency is responsible for completing the procurement in accordance with all applicable laws, rules and statutes.

**Procurement Processing - Above an Agency's Purchasing Threshold**

For procurement outside of an agency's procurement threshold, your agency should begin sending the IT Telecom procurement documents to [purchasing@osf.ok.gov](mailto:purchasing@osf.ok.gov), beginning January 1, 2012. All requests must include the ***applicable*** documents, including; a requisition signed by an approving official, the OSF form 115, the agreement or contract, sole source, non-collusion, any vendor provided quotes, statement of work or specifications, required vendor schedules, request for quote, VPAT, evaluation scoring tool or method, suggested vendor list. If your agency is not on-line with PeopleSoft, an internal



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requisition, signed by an approving official for your agency, must be submitted. When utilizing PeopleSoft, you should select the "OSF" origin when creating your requisition. Electronic copies of all documents necessary to complete proposal or quote development should be in a modifiable format (Word and Excel for example). Other documents may be requested as needed.

All agency IT or Telecom renewals and change orders that originated with the Central Services Department should also be forwarded to [purchasing@osf.ok.gov](mailto:purchasing@osf.ok.gov), beginning January 1, 2012. Supporting documentation should include **as applicable**; the sole source, a copy of the original purchase order, an Office of State Finance Form 115, any available supporting contract documents, and a Central Purchasing Change Order Request Form #10, which can be located at: ([https://www.ok.gov/dcs/searchdocs/app/index.php?CATEGORY\\_ID=&UNIT\\_ID=8&START\\_DATE=MM%2FDD%2FYYYY&END\\_DATE=MM%2FDD%2FYYYY&DATE\\_TYPE=0&KEYWORD=&LISTINGS\\_PER\\_PAGE=5&button=Search](https://www.ok.gov/dcs/searchdocs/app/index.php?CATEGORY_ID=&UNIT_ID=8&START_DATE=MM%2FDD%2FYYYY&END_DATE=MM%2FDD%2FYYYY&DATE_TYPE=0&KEYWORD=&LISTINGS_PER_PAGE=5&button=Search))

In order to allow proper processing time during this transition, we ask that you submit the procurement with as much lead time as possible, and a minimum of thirty days prior to renewal should be your standard practice. New procurement for competitive bid will be prioritized and worked in accordance with needs, urgency, and the state's priorities. If you have an acquisition that has IT or Telecom components, and you are questioning whether or not the procurement is an IT or Telecom acquisition, you can send it to ISD for approval and ISD will coordinate the final disposition with your agency.

**Microsoft Installation Disks**

Effective January 1, 2012 agencies needing to temporarily checkout Microsoft installation disks for Microsoft desktop applications and operating systems are to send an email to [purchasing@osf.ok.gov](mailto:purchasing@osf.ok.gov) requesting the specific application and release needed.

The Information Services Division will checkout the disk(s) in your name, and notify you by email when the disk(s) are ready for you to pickup.

**Future Communication**

Additional information in the form of IT-Telecom Procurement Information Memorandums (ITPIMs) will be announced as needed. PIMs related to IT or Telecom procurement will be identified as IT PIMs. For example, this is ITPIM-01. All IT and Telecom related communication (ITPIMs) will be posted to the procurement section of the Information Services Division website.

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As we receive your feedback on issues requiring additional clarification, we will revise this procurement information memorandum, or provide additional forms of communication.

During this time of transition we ask for your patience, cooperation and feedback. We will communicate with you as frequently as possible. We are currently identifying optimal and automated ways of processing requests.

Questions regarding this PIM should be directed to: [helpdesk@osf.ok.gov](mailto:helpdesk@osf.ok.gov).

Thank you for your cooperation and assistance, we look forward to working with you.

The Procurement Group, Office of State Finance - Information Services Division