State of Louisiana
DIVISION OF ADMINISTRATION

OFFICE OF THE COMMISSIONER

ILEEN BABINEAUX BLANCO
GOVERNOR

JERRY LUKE LEBLANC
COMMISSIONER OF ADMINISTRATION

DIVISION OF ADMINISTRATION

POLICY NO. 19

EFFECTIVE DATE: **August 26, 2002, Revised October 15, 2004, February 1, 2005**

SUBJECT: **ACQUISITIONS**

AUTHORIZATION: **Whitman J. Kling, Jr., Deputy Undersecretary**

I. **POLICY:** All acquisitions made within the Division of Administration must be properly justified, approved and acquired as specified in this policy. All acquisitions for the following must be justified using the attached Justification Form:

- acquisitions exceeding $1,000 for non-Information Technology (IT) items
- acquisitions exceeding $1,000 but less than $100,000 for standard IT items
- acquisitions for all non-standard IT items less than $100,000

IT acquisitions of $100,000 or more must be justified in the manner specified using the IT Request forms. These acquisitions require the approval of the Office of Information Technology (OIT) and the appropriate Procurement Support Team. The IT Request forms are located on the OIT website under IT Guidelines.
http://www.doa.louisiana.gov/oit/publications/pub_guidelines.htm

II. **PURPOSE:** The purpose of this policy is to establish the procedure for acquisitions made within the Division of Administration.

III. **APPLICABILITY:** This policy applies to all sections within the DOA, both appropriated and ancillary.

IV. **PROCEDURES:**

A. **NON-INFORMATION TECHNOLOGY ITEMS:**

The DOA section head must complete the attached justification form and present the justification to the appropriate Assistant Commissioner. Upon review and approval by the Assistant Commissioner, the justification will be forwarded to the Deputy Undersecretary for approval consideration.

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After approval of the Assistant Commissioner and Deputy Undersecretary is obtained, the justification form is forwarded to the appropriate procurement staff:

For appropriated sections - Office of Finance and Support Services.
For ancillary sections - the requesting section.

Any disapproval comments will be returned to the requesting section.

B. INFORMATION TECHNOLOGY ITEMS

1. **Justification/Approval:** It is the responsibility of the DOA sections to define the business requirement to justify the need for hardware and software, and to prepare the attached justification form. The OIS contact can assist the sections in identifying software to meet the business requirements. Once the business needs are defined, OCS is responsible for preparing the hardware configuration and identifying standard operating system and desktop software to run on that hardware, for inclusion with the justification.

   For non-standard purchases (hardware/software), the DOA section must obtain approval from the OCS Director, the Assistant Commissioner and the Deputy Undersecretary. This process will assure the hardware or software fits into the overall DOA strategy.

   For standard purchases (hardware/software), which are under $100,000, and for which funding has been requested and is available in OCS' budget, the DOA section must obtain approvals of the OCS Director, the Assistant Commissioner and the Deputy Undersecretary.

   After signed approval has been obtained from OCS, the Assistant Commissioner, and the Deputy Undersecretary, the justification form is forwarded to the appropriate procurement staff:

   For appropriated sections - OCS Procurement Coordinator.
   For ancillary sections – the requesting section.

   Any disapproval comments will be returned to the requesting section.

2. **Funding:** For the appropriated DOA sections, OCS will include as part of its budget request, the acquisition, lease/rental, and maintenance cost of all standard information technology hardware and software. It will be the responsibility of each section to fund non-standard hardware and software.

   Ancillary DOA sections will fund the acquisition of all information technology hardware and the initial purchase of all software. OCS will fund, as part of its

budget request for the ancillary DOA sections, the maintenance cost of all standard hardware and software. The ancillary section will be required to fund the maintenance of specialized software and hardware.

3. **Hardware Acquisition:** All acquisitions of hardware for DOA sections will be processed through OCS.

   OCS is responsible for defining the configuration of hardware, preparing associated ITBs/RFPs, and initial preparation of requisitions for all sections in the DOA. The ancillary DOA sections are responsible for the final processing of any acquisition paperwork. OIS and/or OCS can supply representatives to attend the Procurement Support Team meetings (hardware and professional services), evaluate bids, and make the recommendation for vendor selection with participation from the section.

4. **Software Acquisition:** All standard software will be provided by OCS in accordance with OIT standards.

   Any non-standard software must be selected by the respective user section and OIS, in conjunction with OCS. These packages must conform to the software, hardware, and support environment defined by OCS. Any package the user feels is justified, but which does not conform to this environment, must follow the justification process defined in this policy.

   Software orders of $5,000 or more require approval of the Office of State Purchasing.

5. **Hardware Receipt and Installation:** All hardware will be delivered to OCS. OCS will inspect and configure the hardware according to specifications before it is installed for the section's use.

6. **Inventory:** All hardware, except that acquired by ancillary agencies, is the property of OCS and will be inventoried by OCS. It is the responsibility of ancillary sections to inventory the hardware that they have acquired for property control purposes. For hardware maintenance purposes, OCS will maintain a master inventory of <u>all</u> hardware for all sections in the DOA.

V. **RESPONSIBILITY:** DOA section heads are responsible for assuring the proper approvals are obtained before acquiring any non-IT or IT standard item valued over $1,000, and any non-standard IT purchases.

VI. **STANDARDS:** Standards are established by OCS and are located on the OCS website at https://isbwwwprod2.doa.louisiana.gov/OCS/pclan/LAN Handbook/hardware.htm or https://isbwwwprod2.doa.louisiana.gov/OCS/pclan/LAN Handbook/software.htm

DOA JUSTIFICATION FORM

Item(s):

(DATE)

To: (NAME)
Assistant Commissioner

To: Whit Kling
Deputy Undersecretary

Recommended by: (APPLICABLE SECTION HEAD NAME)
(TITLE)

Budget Unit: (SECTION NAME)

☐ Non-information technology (IT) related > $1000
☐ Standard IT purchase >$1,000 and < $100,000
☐ Non-standard IT purchase < $100,000

APPROVALS FOR IT PURCHASES:

OCS DIRECTOR

_____ Approved: ___ Rejected: ____
Randall Walker

Comments: _____

_____

APPROVALS FOR ALL ACQUISITIONS:

ASSISTANT COMMISSIONER

_____ Approved: ___ Rejected: ____
(Name)

Comments: _____

_____

DEPUTY UNDERSECRETARY

_____ Approved: ___ Rejected: ____
Whit Kling

Comments: _____

_____

Non-Information Technology (IT) Items:

Description (Itemized List)	Unit of Measure	Estimated Unit Price	Estimated Total Cost
		Total	

Justification:

Funding Source:

Information Technology (IT) Items - Software

Itemized List	Unit of Measure	Estimated Unit Price	Estimated Total Cost
Item:			
Permanent license fee			
Annual license fee			
Fixed term license fee Indicate length of term:_____			
If not for a permanent license, give subsequent year costs. Explain multi-year benefits: _____			
Installation cost			
Personnel training cost			
Cost of any additional hardware			
Annual maintenance cost			
Annual technical support cost			
Miscellaneous costs:			
		Total	

Justification:

NOTE: For software costing more than $5000, the following must be completed.

Describe mission to be accomplished:

Identify hardware platform and operating system on which new proposed software is to be used:

Funding Source (if current operating budget or capital outlay, provide BA-22 or BA-7):

State the overall impact the software will have on the performance of the installation, and the factors used in reaching this conclusion:

List all known packages investigated to accomplish the required task including the total cost for each. Include the rationale for selection or rejection:

Prepared by: **Phone Number:**

Information Technology (IT) Items - Hardware

Itemized List	Unit of Measure	Estimated Unit Price	Estimated Total Cost
Item:			
Lease			
Purchase			
Rental			
Maintenance			
Other:			
		Total	

Justification:

Funding Source:

Prepared by: **Phone Number:**