

Transcript of  
“Agency IT Planning to Procurement”

Provided by  
DAS/Office of Information Technology, Strategy & Investment Management

**Slide 1:**

Hello,

My name is Nadine Williams and I am going to walk you through today’s presentation titled “Agency IT Planning to Procurement.” This webinar is hosted by the DAS/ Office of Information Technology/ Strategy and Investment Management also known as SIM.

So on behalf of Carolyn Chavanne, SIM administrator and the entire SIM Team

Welcome! . . . So let’s get started.

**Slide 2:**

The Strategy and Investment Management group has embraced a holistic approach that begins each respective agency determining and planning for their IT needs; and continues through the completion of the procurement process.

This all-inclusive methodology provides states agencies with ongoing guidance and support as they work to identify and acquire the IT goods and services needed to support their mission and business needs.

**Slide 3:**

On this slide we have classified the 4 main elements that encompass the “Agency IT Planning to Procurement” methodology.

The **first**, fundamental element is **AGENCY IT PLANNING**—we recommended that the agency incorporate key staff from its planning, business, fiscal and procurement areas in the agency IT planning effort

**Next** is the **OIT Enterprise Review** of state agency IT plans; this activity is comprised of subject matter experts from various business units within OIT and incorporates valuable feedback to agencies.

Transcript of  
“Agency IT Planning to Procurement”

Provided by  
DAS/Office of Information Technology, Strategy & Investment Management

The **third** element is the **Enterprise IT Contracting Procurement Plan**—a shared responsibility between the OIT/Enterprise IT Contracting group and the respective state agency.

**Last** is the **Procurement to Release & Permit** element with the “Agency IT Planning to Procurement” methodology.

As we move forward, I will provide a high-level overview of each key element.

**Slide 4:**

Now, let’s take a bit of a closer look at the first, essential element in the “Agency IT Planning to Procurement” methodology: that is, **Agency IT Planning** – the IT planning strategy developed and recognized begins with an IT application / project-centric, planning approach that:

- Delivers an agency-wide view of your agency’s applications and projects. This not only helps to facilitate an agency’s ability to quickly identify and, in turn, align projects to the applications they support; it also, as applicable, enables an enterprise-wide representation of IT applications and projects, as well
- The IT planning strategy endorses an agency-explicit partnership among the agency’s business, fiscal, IT and procurement staff
- Furthermore, agency procurement requests will fast-track through the Advance Procurement Process
- And the OAKS actual expenditures for each agency will be provided

**Slide 5:**

Once an agency has satisfied their internal “IT planning effort,” they are now positioned for the next step of progression—the OIT/Enterprise Review of their IT plan;

Transcript of  
“Agency IT Planning to Procurement”

Provided by  
DAS/Office of Information Technology, Strategy & Investment Management

the review of agency IT plans is conducted with specific focus on an agency’s IT applications and IT projects

- This requirement, the Enterprise Review of agency IT plans, is a significant activity and will help the agency by establishing a clear route for acquiring needed procurements.
  - Thus, the enterprise review provides the agency with a path to procurement—this will occur “before” quotes are pursued or vendor selections achieved
- The question becomes; who will perform the review of my agency’s IT Plan? Various **Subject Matter Experts** within the different program areas of OIT become engaged in the assessment and evaluation of the agency’s IT applications and projects.
  - OIT reviewers will initially concentrate their efforts on project resources needed in fiscal year 2016
  - Then will continue, to review remaining project resources, as necessary
  - This newly embraced, holistic approach allows for the discontinuation of the need for additional reviews to occur in the R&P application
  - And permits approved project resources to move directly to the Advanced Procurement path
- Subsequently, the Release & Permit application serves as an endorsement, validation of the agency’s established procurement plan and/or procurement process

Continue with me as we examine the key components of the Advanced Procurement Process.

Transcript of  
“Agency IT Planning to Procurement”

Provided by  
DAS/Office of Information Technology, Strategy & Investment Management

**Slide 6:**

As precursor to the discussion of the core components within the Advanced Procurement Process, it is important to note that the agency’s “Advance Procurement Process” will be developed and managed, as a dual engagement between the respective state agency and the OIT/ Enterprise IT Contracting group.

Now, let’s examine the core components:

- the agency will work with OIT/Enterprise IT Contracting in constructing their Advanced Procurement Plan or process representative of **EACH** resource needed; this will occur **AFTER** the resources are approved and **prior** to beginning procurement activities
  - your agency staff, in partnership with the Enterprise IT Contracting staff will identify and determine the “next steps” for your agency
- With an Advanced Procurement Plan in place, the purchasing authority will be determined based on contract availability
- With an Advanced Procurement Plan in place, the need for re-entry of data in the R&P system is eliminated—and the R&P request with pertinent ALPS project procurement data is established
- And, with an Advanced Procurement Plan in place, Enterprise IT Contracting staff are the **ONLY** ones required to review R&P requests

**Slide 7:**

In this slide we will explore how OIT/Enterprise IT Contracting staff will work with state agency staff in the formation of their “Advanced Procurement Plans.”

It all begins with Enterprise IT Contracting using information gathered during the OIT/Enterprise Review process, as the means to accelerate an agencies’ IT buying practice

Transcript of  
“Agency IT Planning to Procurement”

Provided by  
DAS/Office of Information Technology, Strategy & Investment Management

- As previously stated, before an agency conducts its final procurement activities, the agency’s Advanced Procurement Plan will be in place
  - There is joint collaboration in determining method, authority and other procurement criteria designated to be included in the agency’s Advanced Procurement Plan; and
  - Through this endeavor, a clear, pre-determined path by which to obtain planned IT procurements is made available to each participating agency.

**Slide 8:**

We will progress yet again as we discuss Advance Procurement to Release and Permit.

Once a state agency, in collaboration with Enterprise IT Contracting, has developed their Advanced Procurement Plan, the established Plan becomes the pathway for the agency’s tactical acquisitions through the Release and Permit system.

- An agency’s Advance Procurement plan is completed in the R&P system – How will this occur?
  - Release and Permit requests will be pre-populated with pertinent information including, agency code, fiscal year, request type & title, purchase justification as the agency has listed in ALPS
- Agencies will be able to append additional, pertinent information to their procurement plans such as, solicitation and evaluation documents, and price quotes
- After all data and information related to a planned project resource has been secured, the requesting agency will confirm and submit requests to OIT for processing

Transcript of  
“Agency IT Planning to Procurement”

Provided by  
DAS/Office of Information Technology, Strategy & Investment Management

**Slide 9:**

In conclusion, we want to inform the agencies of option changes to the Release and Permit system that will become effective at the start of fiscal year 2016.

Two options are available – the Advance Procurement Option and the Non-Advance Procurement Option

The first option allows procurement requests to be processed within 1-to-2 business days; whereas with the second option (non-advance procurement) the agency requests are required to be processed by a review of each planned proposed project resource following the “Agency IT Planning to Procurement” methodology outlined early in this presentation.

As a planning tool and aid, state agencies may request an IT Business Plan report that lists all IT application and project information that is documented in the ALPS system by the respective agency.

This concludes our Webinar on “Agency IT Planning to Procurement.” Our sincere hope is that you will find the information contained in it both relatable and helpful.

The Strategy and Investment Management team is committed to our offering of ongoing support and guidance.

Our contact information is as follows – our SIM Analysts and other SIM contacts. We encourage your questions and requests for assistance.

Remember, as a state of Ohio enterprise, “Our Future Success IS a shared Responsibility!!