

## **Lucas County IT Procurement Policy**

Effective 10/1/12

Revised 3/4/21

### **Purpose**

In conjunction with ORC 307.84 regarding the Automatic Data Processing Board (DP Board), no county office shall purchase, lease, operate, or contract for the use of any automatic or electronic data processing or record-keeping equipment, software, or services without prior approval of the board. The purpose of this policy is to provide further criteria for procurement of and investment in IT hardware, software and related services for all Lucas County offices, departments, and agencies under DP Board oversight. By definition, these are any officer, department, board, commission, agency, court, or other office of the county, other than a board of county hospital trustees.

The goal of the approval process is to ensure that all IT hardware, software and services are compatible with Lucas County's technology environment and that they meet Lucas County IT security policies prior to purchase. IT requests are also reviewed to ensure they align with IT best practices and standards which improve reliability and reduce the total cost of ownership and support.

### **Policy**

- A. Hardware/Software/IT services procurement under \$7,500 requires review by Lucas County Information Services (LCIS). Written approval will be provided via the LCIS Checklist and will be completed by LCIS management prior to procurement initiation from the requesting county office, department, or agency. Exceptions to this policy are listed in the Exclusions Section at the end of this document.
- B. Hardware/Software/IT services procurement of \$7,500 or more will require formal DP Board review and approval along with pricing quotations. Exceptions to this policy are listed in the Exclusions Section at the end of this document.
- C. Any and all hardware procurement which will attach to the Lucas County network must be submitted for review to LCIS regardless of dollar value. These can include, but are not limited to PC's, servers, network equipment, monitors, printers, scanners, multi-function copiers, laptops, tablets, and smart phones. The LCIS Director or their designee will review the request and either approve, reject or request additional information. Formal DP Board approval may be required at the discretion of LCIS management.
- D. IT software purchases of \$25,000 or more (one individual license) must be added to the capital asset base as an intangible asset as soon as the software is placed in service.

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- E. IT software purchases or upgrades of \$7,500 or more must have 3 competitive quotations submitted for DP Board review unless the software provider is a sole-source or state term vendor. Exceptions to this policy are listed in the Exclusions Section at the end of this document. Purchases of \$50,000 or more must follow Lucas County purchasing policy for appropriate approvals.
- F. Software/hardware support renewals whose original purchase date is on or after September 29, 2011 and exceeds the \$7,500 threshold must be submitted for procurement approval to the DP Board. Exceptions to this policy are listed in the Exclusions Section at the end of this document.
- G. If IT procurement approval (formal or informal) is required, it must be obtained prior to creation of the vendor's purchase order.
- H. This policy applies to all technology resources and related services owned, used or operated by Lucas County offices, departments, and agencies under ADP Board oversight, regardless of the source of funding, location or intended purpose. All compliance to Lucas County's general purchasing policies and practices will apply.
- I. Non-standard software or hardware may not be supported by LCIS. Before purchasing non-standard software or hardware, the purchaser must identify the source of support.
- J. LCIS Approved Checklist requests should be forwarded to the LCIS Help Desk with the following information:
  - a. Name of the person/department the item or service is for.
  - b. A short justification for the need of the purchase (How it will be used)
  - c. The IT product or service (make, model, version, quantity, etc.)
  - d. The anticipated cost (both initial and ongoing fees)
  - e. The funding source (Oracle fund #, Grant Name, etc.)
  - f. Time frame of need
  - g. Quotations or documentation (LCIS will provide most quotations)

LCIS will review the request, obtain quotes, complete the LCIS Approved Checklist and return to the requester who will place the order following Lucas County purchasing policies.

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### Exclusions

The following items are excluded from DP Board review and formal approval (LCIS approval and Procurement Checklist still required):

- Any and all hardware and software purchases or leases which comply with the technology standards set by LCIS management. These include but are not limited to Microsoft Office, servers, network equipment, PC's, laptops, monitors, printers, scanners, multi-function copiers, netbooks, tablets, laptops and smart phones.

The following items are excluded from LCIS review and approval. (No approval required):

- Any and all hardware purchases or leases which will **not** connect to the Lucas County network, AND any and all hardware or software purchases or leases which do **not** require involvement of LCIS to install or maintain.
- Software/hardware **support renewals** on IT purchases on or after September 29, 2011 that are Ohio state term contract or sole source providers.
- Software/hardware **support renewals** on IT purchases prior to September 29, 2011.

Approved By DP Board 4/1/2021