

Technology Services Board

Topic Synopsis: Policy 122 – Administrative and Financial Systems Investment Approval

Topic overview

On August 17, 2021, the OCIO adopted the new Policy 122 – Administrative and Financial Systems Investment Approval. The purpose of this policy is increase agency use of statewide enterprise systems, reduce the number of agency-specific “shadow” systems, and increase standardization of the state’s business processes. Under the new policy all state agencies, including institutions of higher education, are required to:

- Request and receive written approval from OCIO and OFM or DES before acquiring, deploying, or investing in a new or existing agency administrative or financial solution.
- Submit a request to the OCIO if the proposed investment meets or exceeds the level-of-effort or cost thresholds specific to administrative and financial systems.
- Provide the information necessary to evaluate the investment, including the scope of work, budget, business process areas involved, and the business drivers supporting the request.
- Respond to requests for additional information and/or participate in consultations in support of the evaluation.
- Perform due diligence to understand the business and technology needs driving the investment, conduct high level analysis of existing enterprise or agency-deployed systems to determine if an existing or planned solution meets their business needs, and provide the results to the OCIO as required.
- Comply with the disposition of the request as written.

Agencies have the option to request a broad-scope, system-level evaluation to determine if a system can be exempted from future investment-level approvals. Agencies can also request to apply this evaluation to multiple systems to minimize repetition of work.

The OCIO is seeking TSB approval of Policy 122.