



# ADMINISTRATIVE POLICIES

<b>SECTION:</b> 600 – Information Technology	<b>POLICY#:</b> 605
<b>TITLE:</b> Acquisition of IT Solutions (Services, Software and Hardware)	<b>R &amp; O #:</b> 23-58
	<b>IMPLEMENTED BY PROCEDURE #:</b> 605-A, 605-B
<b>SPONSORING DEPT/DIV:</b> Department of Information Technology Services	
<b>ADOPTED:</b> 9/26/2023	<b>REVIEWED:</b>

**PURPOSE:** The purpose of this policy is to define and establish the process and specify the authority by which Washington County departments and offices request and obtain technology solutions (services, software, and hardware). The intent is to ensure the safety and reliability of county systems and data. This is subordinate to and complements Washington County’s Rules of Procurement.

**AUTHORITY:** This Policy will be administered by the County Administrative Office in accordance with Section 34 of the Washington County Charter and the authority delegated to the County Administrator in Washington County Code Section 2.04.100.

**BACKGROUND:** Under the County’s Administrative Manual, the Department of Information Technology Services (ITS) is responsible for providing and supporting a reliable and secure end user technology, business applications, internet and intranet technologies, County websites, GIS functions, and information security for the County. Further, ITS is responsible for developing and implementing policies related to acceptable use of technology, IT procurement, data, privacy, and information security.

The Procurement Division within Finance is a contributing partner to this policy and procedure document. Washington County’s Rules of Procurement will prevail, and this policy and procedure will complement those rules while providing structure and clarity for technology solutions for County Solution Sponsors.

Washington County Counsel serves as a contributing partner to this policy and procedure document. County Counsel ensures all Federal, State, and County rules are not in conflict with this policy or procedure. Additionally, Counsel ensures the County maintains the highest level of recommended terms and conditions for all technology services are negotiated for, in favor and security of the County, in all technology acquisitions.

**DEFINITIONS:**

The following are terms commonly referenced in this Policy.

Technology:

“Hardware” means any element of a computer that is physical. This includes things like monitors, keyboards, and the insides of devices, like microchips and hard drives.

“Software” means anything that tells hardware what to do and how to do it, including computer programs and apps on your phone.

“Click-To-Agree” means terms and conditions that are “pass through” to users. These often violate Oregon public contracting law or are unacceptable to Washington County for other legal reasons. This may appear on downloads, invoices and payment processing, quotes, or sales orders.

“Services” any contracted services supporting new or existing technology.

“County Solution Sponsor” means a department or division representative (any individual requesting the solution) who will sponsor the cloud-hosted solution.

“Cloud Service Provider” means a company or entity providing the cloud service, usually in a subscription model.

“Amendment” means an addition or supplement to an existing contract.

“Contract” means an agreement, usually written, between parties, with binding legal and moral force; usually exchanging goods or services for money or other consideration.

“Contract Administration” means the management of all facets of a contract that must be taken to assure compliance by all parties. This includes monitoring service or goods, maintaining open communication, making prompt payment, monitoring budget requirements, and closing out the contract when completed.

“Contract Review” means the process in which every County contract is reviewed and approved as to form and process. The individual department administrator, County Counsel, Purchasing and the County Administrative Office perform the review. Upon completion of this review, either the County Administrator or their designee, or the Chair of the Board or their designee then executes the contract.

“Contractor” means an individual or firm who agrees to furnish goods or services to the County; may include a prime contractor and/or a subcontractor.

“Negotiation” means the bargaining process between two or more parties seeking to reach a mutually satisfactory agreement or settlement.

“Prime Contract” means the initial contract or price agreement solicited and awarded during a cooperative procurement by an administering contracting agency.

**GENERAL POLICY:** It is the policy of the Department of Information Technology Services (ITS) to be involved in the review and acquisition of all IT hardware, software, or online services used to conduct County business. ITS will review all new requests for technology solutions. Transactions that are deemed necessary to be procured by ITS to maintain security, compliance, or other benefit to the enterprise will be managed by ITS in coordination with the County Solution Sponsor.

### **POLICY GUIDELINES:**

#### 1. Responsibilities:

1.1. Information Technology Services is responsible for:

1.1.1. Creating a process for County Solution Sponsors (CSS) for new technology requests via ServiceIT (SIT); and

1.1.2. Creating a process to review all technology requests to determine which department (ITS or CSS) will own the procurement transaction,

1.1.3. Determining if an assessment to evaluate the appropriateness, risk and security of new technology requests is necessary.

1.1.4. Determining and communicating results and next steps to the CSS; and

1.1.5. Should ITS be the owner of the transaction and potential contract, ITS would be responsible for maintaining and managing as such.

1.2. The County Solution Sponsor is responsible for:

1.2.1. Reviewing this policy and procedure document; and

1.2.2. Submitting an ITS service request for new technology requests; and

1.2.3. Implementing ITS’ security compliance, determination(s), and next steps for the transaction of new technology requests; and

1.2.4. Whereas appropriate, maintaining and managing the transaction and potential contract as determined.

2. Exceptions: Exceptions to this policy may only be granted by the County Administrator.

3. Implementation: Elected officials and department directors are expected to be knowledgeable of, and shall be responsible for, implementing this policy within their respective departments. Observance of this policy is mandatory for all County employees and violation may result in disciplinary action, up to and including termination.

4. Periodic Review: This policy shall be reviewed by the Department of Information Technology Services and the Procurement Division at least every two (2) years, or more often if needed, and updated as necessary in complement to Washington County Rules of Procurement.