ITSD Work Request, Project Planning and Procurement

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Excellent customer service, every time

Initiative Goal: Streamline governance/technical review of IT requests and related procurement processes from the point of identifying business need to issuing a purchase order for the selected solution.

Identified Opportunities for IT Procurement Improvement

Gap	Solution
Lack of consistent and documented process with clear communication channels	OA has established and will maintain clear, ongoing communication channels with department leadership, fiscal and IT teams, and OA staff regarding the ITSD processes. OA has also streamlined technical review processes.
CITGC approval required for procurement to begin but obtaining extensive information needed for approval leads to procurement challenges when we are ready to procure	Split current project charter into a Business Case presented for CITGC review and a project charter used after approval for project planning and procurement activities.
Use of intake/review practices from COVID-19 Emergency that are no longer appropriate	The new processes identify the various procurement paths and guidance for each path from OA Purchasing and ITSD Procurement rather than limiting agencies to existing contract use.
Premature selection of procurement paths	ITSD's new intake & project planning process will first focus on assessing each department's technology needs. The selection of a procurement path will come after ITSD's technology review and approval. This ensures ITSD can focus on providing direction regarding the optimal technology direction.
Use of QVL Contracts which present legal risks for complex IT projects	Greater guidance is needed on the use of QVL contracts, particularly for IT cloud services and software resellers, given the potential legal risks without cautionary use. The Office of Administration's Purchasing Division recognizes issues with QVL protocols that must be addressed. Imposing more rigorous third-party vendor obligations and limiting contract use to specified circumstances may be necessary.

ITSD Request Intake & Project Approval

The purpose of ITSD's request intake and project approval process is to ensure a single-entry point for requests. This will provide a streamlined, transparent and consistent customer experience and reduce legal risk of premature vendor selection or contract engagement.

The process allows key information to be captured at an early stage for Cabinet Information Technology Governance Counsel (CITGC) approval and built upon in the project planning stage so that the benefits, impacts, requirements, and constraints are fully understood in order to make the best procurement decision possible.

INTAKE FORM	BUSINESS CASE	CITGC	PROJECT PLANNING	PROCUREMENT

INTAKE FORM

Upon approval through your agency IT Governance process, requester will complete ITSD Request Intake Form. This form includes basic information about the request and business challenge you are trying to solve.

BUSINESS CASE

Building upon the information in the Intake Form, an ITSD Intake Analyst will work with the requester to build out a business case.

The business case is high-level information to help CITGC understand the problem, business value and impact of completing the request, and a high-level scope of the proposed project.

The business case also includes key information regarding the budget, key agency resources and timeline constraints.

CITGC

The CITGC is responsible for advancing the best interests of the State of Missouri as a whole while also representing the perspectives of their respective agency.

The business case is presented to the CITGC to ensure requests are not duplicative of other efforts and support the enterprise strategic direction.

PROJECT PLANNING

Once approved by the CITGC, the business case will be turned over to a Project Manager who, in conjunction with a Business Analyst, will work with you and ITSD Enterprise IT Technical Review team to begin project planning and completing the project charter.

Identification of specific business requirements, project scope, process analysis workflows, architecture analysis and cost analysis will be done at this stage.

PROCUREMENT

Utilizing the business requirements, architecture recommendations and other details in the project charter, ITSD Procurement will determine the best procurement path to ensure project success with the least amount of legal risk.

Procurement path should not be determined prior to identifying business requirements and project scope.

ITSD

Your Door to ITSD

- Simple on-line form to complete summary information about business need and other information related to your request.

- Form is automatically submitted to intake analyst who will contact you with any preliminary questions

- Intake staff will utilize preliminary information to start shell business case

- Weekly status updates sent to key stakeholders for transparency- this will continue up to project kick off


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Details Emerge

- Intake Analyst will facilitate completion of business case.

- Information primarily provide by business staff with assistance from BRM and intake analyst as needed.

- Business case is intended to provide high level information related to the project.

CITGC Approval

- $1M Threshold

- Business Case and Summary slide presented to CITGC

- More items may go as cost is unknown at this point
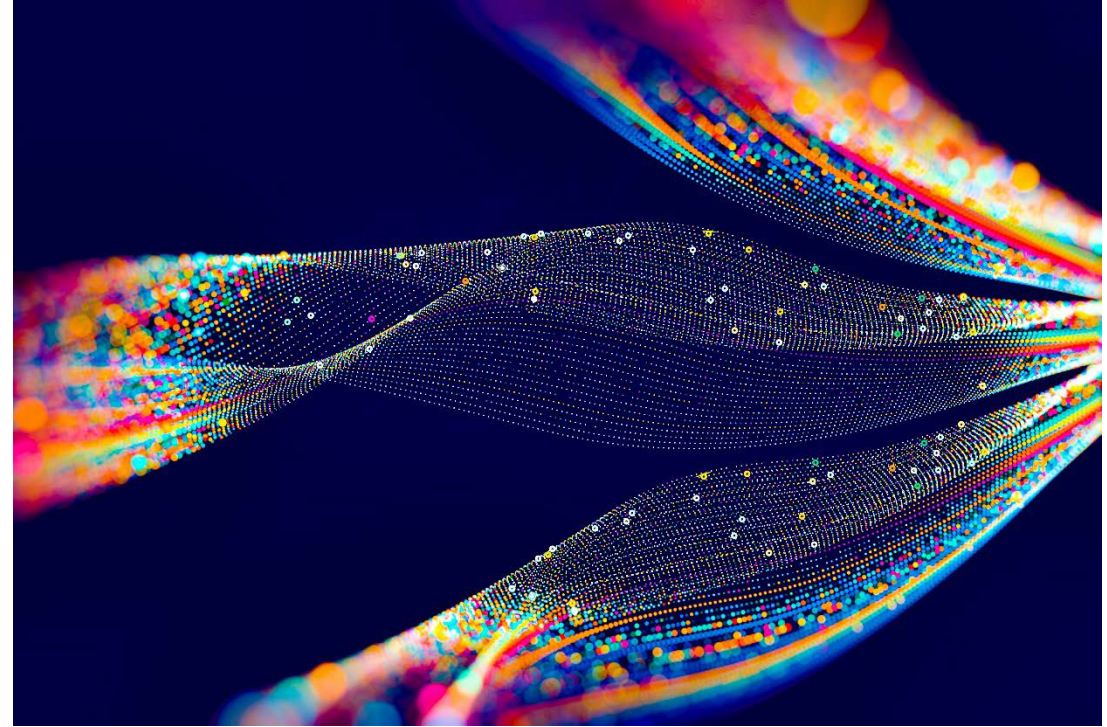
The Deep Work Begins…

- Once the CITGC has approved the business case and resources from ITSD (BA, PM, etc.) and Business (Project Sponsor, Business Lead, etc.) have been assigned, the team can begin developing the Charter

- Priority of the project is reverified with the agency. Agency and ITSD resource availability is assessed based on current projects in process. This will determine if further work is done on the project charter immediately or if other projects take priority

- The assigned PM and BA will work towards completing the Project Charter coordinating with the appropriate IT and Business staff

- Enterprise IT (EIT) technical review occurs during the planning phase to ensure technical direction aligns with ITSD policies and enterprise standards

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Enterprise IT (EIT) Technology Review

- EIT coordinates **ALL** technical reviews and approvals
  - Cybersecurity
  - Enterprise Architecture
  - State Data Center
  - Network
  - Cloud
  - CES (if the project includes tablets, signature pads, etc)
  - Other areas as needed

* EIT does not deny or approve requests. They facilitate technical reviews and provide recommendations based on all functional area input. If presented with a named solution too early in the process, it could be denied by one of the functional areas above

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The Picture Becomes Clearer

- As the project charter is being worked, ITSD Procurement will be pulled in for preliminary discussions of procurement path
  - Procurement path cannot be predetermined prior to having the business requirements collected in the charter

- Upon charter completion, business requirements and information will be used for procurement (PAQ, RFP, etc)
  - Competitive Procurement is necessary for all IT services

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Procurement Takes Place

- Procurement begins

- EIT Procurement Solutions Review performed as part of evaluation to ensure vendor proposed solutions (software, hardware) is safe

- Response Evaluations are completed

- Procurement Award

- Vendors background checks are completed, and vendors are then onboarded

Project initiation/planning is over and the Project may begin

- The Project Manager will perform the project kickoff with the help of the project team to set expectations and understandings
- The team will follow the normal project reporting cadence thereafter

QUESTIONS?