



**Commonwealth of Massachusetts**

Executive Office of Technology Services and Security (EOTSS)

Office of the Secretary

# Administrative Directive 2024-1: Oversight and Approval of IT Procurements

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<b>This document partially rescinds Administrative Directive 2019-1</b>	

## Table of Contents

1. Authority .....	2
2. Scope .....	2
3. Definitions .....	2
4. IT Procurement Approval .....	3
5. Implementation .....	4
6. Contact .....	4
7. Document Change Control.....	5
ATTACHMENT A .....	6

## 1. Authority

M.G.L. Ch. 7d, §§ 2, 3(a), 3(b), 7

## 2. Scope

This document applies to the use of information, information systems, electronic and computing devices, applications, and network resources used to conduct business on behalf of the Commonwealth. The document applies to the Executive Branch including all executive offices, boards, commissions, agencies, departments, divisions, councils, bureaus, and offices within an executive office, hereinafter referred to as Commonwealth Agencies and Offices. Commonwealth Agencies and Offices are required to implement procedures that ensure their personnel, including vendors, contractors, and consultants, comply with requirements in regard to safeguarding information owned or entrusted to the Commonwealth.

## 3. Definitions

**Chief Information Officer:** or "CIO", the chief information officer of the Commonwealth.

**Information technology:** or "IT", hardware, software, telecommunications equipment and related services designed for the storage, manipulation, and retrieval of data by electronic or mechanical means including, but not limited to, personal computers, mainframes, wide and local area networks, servers, mobile or portable computers, peripheral equipment, telephones, wireless communications, handheld devices, cloud-based application and platform services, public safety radio services, facsimile machines, data centers, dedicated training facilities and switching facilities, and related consulting services, including staff augmentation services.

**Secretariat Chief Information Officer:** or "SCIO", the person responsible for technology services, security, and information technology in each executive office other than the executive office of technology services and security, who reports to both the secretary of technology services and security and the secretary of the executive office for whose technology services the SCIO is responsible.

**State agency or agency:** a legal entity of state government established by the general court as an agency, board, bureau, commission, council, department, office or division of the commonwealth with a specific mission and which is subject to the control of the governor or whose administration has been solely appointed by the governor.

## 4. IT Procurement Approval

Sharing IT procurement plans well in advance helps us all make more informed decisions that will impact our collective success. Your support and insights play a vital role in ensuring that our technology investments align with our strategy and deliver the best possible outcomes for the citizens and businesses of the Commonwealth.

Additionally, Administrative Directive 2019-1 details EOTSS' requirements to review and approve "any planned information technology development project or purchase" by Agencies under the authority of the Governor for which the total projected cost exceeds \$200,000 – before the agency obligates funds for the procurement, as well as to submit an annual report to the State Auditor and Legislature documenting "a complete accounting of and justification for all project-related expenditures totaling \$250,000 or more over the previous 12-month period." This administrative directive partially rescinds 2019-1 by consolidating the \$200,000 requirement into this administrative directive and leaving the \$250,000 requirement intact.

This administrative directive is issued to promote transparency, efficiency, and accountability in the procurement of Information Technology (IT) services and products by State Agencies and allows EOTSS to fulfill its reporting obligations. It establishes a framework for Agencies to provide forecasts of IT procurements and to report on these procurements on a quarterly basis.

Accordingly, all Commonwealth Agencies and Offices are required to provide forecasts of their IT procurement needs for the upcoming fiscal year and each fiscal year thereafter. These forecasts must include estimated budgetary requirements and a description of the intended IT procurements, as detailed in Attachment A. Effective immediately, the following applies for all IT procurements using UU<sup>1</sup> codes:

1. Before drafting any detailed requirements, procurements (RFQs, RFRs or RFIs) or requesting quotes from vendors in excess of \$500,000, the Agency CIO or his or her designee must submit the following request: [IT Procurement \\$500K+ | ServiceNow](#) and await EOTSS' written approval prior to taking any additional steps in the procurement process.
2. Secretariat CIOs must consolidate Agency IT procurement forecasts and reports in excess of \$200,000 and submit these quarterly to [EOTSS-IT-Procurement-Approvals@mass.gov](mailto:EOTSS-IT-Procurement-Approvals@mass.gov) using the template in Attachment A. The quarterly reports must include a complete list of IT procurement forecasts and the progress and status of IT procurements within their respective agencies. These reports shall include the status of ongoing procurements and any changes to budgets or forecasts. The

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<sup>1</sup> The Office of the Comptroller, Expenditure Classification Handbook <https://www.macomptroller.org/expenditure-classification-handbook/>

quarterly reports are due by 5:00PM on March 31, June 30, September 30, and December 31 of each calendar year.

## 5. Implementation

Secretariat CIOs are responsible for policy compliance for their secretariats and must designate Agency CIOs, or other knowledgeable person, as the responsible officer to oversee compliance with this directive and provide regular updates to the Secretariat CIO regarding their IT procurement forecasting and reporting activities.

## 6. Contact

The owner of this document is the EOTSS Secretary (or their designee). It is the responsibility of the document owner to maintain, update and communicate the content of this document. Questions regarding this document must be submitted to the document owner by sending an email to [EOTSS-IT-Procurement-Approvals@mass.gov](mailto:EOTSS-IT-Procurement-Approvals@mass.gov).

## 7. Document Change Control

Version No.	Revised by	Effective Date	Description of Changes
1.0.0	Jason Snyder	10/23/2024	Initial document
1.1	Jessica M. Powers	5/1/2025	Reformatted document

## ATTACHMENT A

Forecast and progress reports should include the following information for each line item.

**Agency:**

*Agency / Secretariat*

**Completed by:**

*Name / e-mail*

**Period (from / to):**

*mm/dd/yyyy - mm/dd/yyyy*

**Ref:**

*Procurement name / ID*

**Procurement Information:**

- **Purpose**  
*What is the purpose of this procurement?*
- **New or Replacement**  
*Is this new or does it replace an existing technology?*
- **Strategic Alignment**  
*How does this procurement align with your IT strategy and EOTSS enterprise standards?*
- **Budget Allocation**  
*What is the budget allocated for this procurement?*
- **OpX or CapX**  
*Is this an operating or a capital budget?*
- **Management and Maintenance**  
*Who will be responsible for managing and maintaining the new solution?*
- **Cost**  
*What is the cost of operating and maintaining the technology?*

*EOTSS Capital Planning will provide templates to Agencies to assist in reporting procurement forecasts.*

Information provided on this template, to the extent forecasted procurements are completed, may be referenced when populating the *IT Procurements Greater than \$200,000 Report*, which remains a statutory requirement. Simply report the reference number of this report on the \$200,000 report.