



**Policy Type:** Board

**Category:** Procurement

**Policy Name:** Information Technology (IT) Product and Service Contracts -  
Board Policy 5.11

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5.11

## **INFORMATION TECHNOLOGY (IT) PRODUCT AND SERVICE CONTRACTS**

### **5.11.1 Overview**

This Section addresses Software, Hardware, Maintenance, and IT Services.

### **5.11.2 Policy**

It is the policy of the Board that the procurement of IT Product and Service is consistent with applicable laws, while achieving economies of scale and ensuring appropriate support models are established so that the County's IT is consistent with industry standards and practices, and is capable of handling the ever-changing information technology industry and the multiple variations provided by software, hardware, maintenance and IT service providers.

### **5.11.3 Background**

The County contracts with different entities to procure Software, Hardware, Maintenance, and IT Services.

(A) Examples of products include, but are not limited to:



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- (1) Commodity software and maintenance/upgrade agreements, including office productivity products, such as email, word processing, and presentation products;
- (2) Commodity hardware, such as servers, microcomputers, Smartphones, tablets, and printers;
- (3) Enterprise software solutions, such as a financial or payroll systems;
- (4) Shared software solutions, such as applications shared by a sub-group within the County, such as the Law and Justice Community;
- (5) Business-specific software applications that only address a specific business need, such as an electronic health record system;
- (6) Software products that provide capabilities that are available for free or with minimal maintenance fees; and
- (7) Hardware products and maintenance that meet countywide infrastructure or department-specific needs.

(B) Examples of services include, but are not limited to:

- (1) Business analysis, system/application design, development, implementation, project management, technical consulting, training or maintenance.

### **5.11.4 Purpose**

The purpose of Section 5.11 is to ensure that all IT Product and Service contracts are:



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- (A) Consistent with County policies and procedures;
- (B) Procured through requests and methods of procurement that have been reviewed and approved as defined in the County's IT Product and Service Contracting Guidelines;
- (C) Appropriate for County business purposes only;
- (D) In alignment with established County IT Principles and Standards Guidelines developed by the County Chief Information Officer or designee and the County Information Technology Council, to achieve economies of scale, to ensure appropriate support models are established, and to be consistent with industry standards and practices;
- (E) Comply with all applicable laws, including but not limited to laws related to security, privacy, confidentiality, HIPAA, discrimination, copyrights, trademarks, and accessibility under Section 508 Amendment to the Rehabilitation Act of 1973; and
- (F) Follow the exemption procedures within the County's IT Product and Service Contracting Guidelines.

### **5.11.5 Application of the Policy**

#### **5.11.5.1 Administration**

The policies and guidelines covered by the Information Technology Product and Service Contracting Policy will be developed and managed by a governance committee or council reporting to the County's Executive Governance Steering Committee assigned to oversee the management of Information Technology in the County.



(A) The responsible committee or council, in conjunction with the Procurement Department and County Counsel's Office, is responsible for, but not limited to, the:

(1) Development and ongoing management of the County's IT Principles and Standards;

Development and on-going management of the County's IT Product and Service Contracting Guidelines;

(2) Development and on-going management of the County's IT Principles and Standards Guidelines;

(3) Development and on-going management of requirements to establish Master contracts for Countywide use;

(4) Oversight and guidance to assist in the development of requirements and appropriate solicitation methods as defined in the County IT Product and Service Contracting Guidelines; and

(5) Other responsibilities and tasks as identified by the Executive Governance Steering Committee

#### **5.11.5.2 Method(s) of Solicitation**

The Information Technology industry and contracting approaches change rapidly. In order to maintain appropriate methods of solicitation, guidelines are provided and managed on an on-going basis in the County IT Product and Service Contracting Guidelines. These guidelines must be consistent with this Chapter of the Board Policy, the Administrative Guidelines and the County's Contracting Manual.



### **5.11.6 Applicable Legal Authority**

The applicable legal authority for this Section includes, but is not limited to the following:

California Government Code Sections 23004, 23005, 25500 – 25009; 31000

County of Santa Clara Ordinance Code Sections A34-78 – A34-91

Charter of the County of Santa Clara Article III, Section 300

Section 508 Amendment to the Rehabilitation Act of 1973

### **Related Policies**

None.

### **Related Forms and Information**

- IT Asset Management Standards and Guidelines - [\[url\]/sites/cio/service-portfolio/Pages/IT-Standards-Policies-and-Guidelines.aspx](#)

#### *Current County Standards*

- IT Asset Management Standards and Guidelines - Current County IT Hardware Standards - [\[url\]/sites/cio/service-portfolio/Documents/standard-IT-hardware-configuration.pdf](#)
- IT Asset Management Standards and Guidelines - Current County IT Accessory Standards - [\[url\]/sites/cio/service-portfolio/Documents/standard-county-accessory.pdf](#)



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- IT Asset Management Standards and Guidelines - Current County IT Cellular Standards - [\[url\]/sites/cio/service-portfolio/Documents/Cellular%20Standards.pdf](#)

### Current County IT Asset Management Memos

- April 5, 2017 CIO ITAM Purchasing Memorandum - [\[url\]/sites/cio/service-portfolio/Documents/CIO-ITAM-purchasing-memorandum.pdf](#)
- July 6, 2017 Cellular Standards Memorandum - [\[url\]/sites/cio/service-portfolio/Documents/cellular-standards-memorandum.pdf](#)
- July 6, 2017 Accessories Purchasing Memorandum - [\[url\]/sites/cio/service-portfolio/Documents/cellular-standards-memorandum.pdf](#)

### **History**

Date	Changes Made
6/20/2018	Links added to IT Asset Management resources.
3/19/2014	Policy Uploaded. (Kyle Larson)