



simplifying IT



# Changes to FY 19 Information Technology Offerings for Internal Audit Management Software

Transition of Contract Oversight for TeamMate from State Auditor's Office to the Department of Information Resources (DIR)

February 16, 2018

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# Purpose for New Changes

- Ensure procurement laws and statutes are followed for acquiring statewide IT and technology software purchases under DIR contracts.
- Work closely with State Auditor's Office and other key stakeholders to ensure a successful transition of audit management services.
- Provide a significant cost savings and added value for existing and new customers.
- Expand services by offering multiple service providers for meeting audit business needs.

# Transition of Audit Management Software Services

# Current State of TeamMate Audit Software & Licenses

- State Auditor's Office transferred TeamMate Software to DIR in early December 2017.
- TeamMate is a propriety software owned exclusively by Wolters Kluwer Financial Services with no resellers in Texas or the United States.
- Since 2007, Software Services Managed by State Auditor's Office.
- **1200** Total Licenses for State Agencies with IACs.
- **\$270K** Estimated Yearly Contract Value.
- **Current Contract Expires August 31, 2018.**
- No additional renewal options or contract in place for continuation of services beyond August 31, 2018.

# Transition & Communication Plans

# TeamMate Transition Plan

- DIR has taken the lead and has initiated the planning and coordination activities for transition and continuation of audit management services.
- DIR has drafted a three-phased approach to include:
  - Phase 1 Planning (December 2017 through January 2018)
  - Phase 2 Procurement (February – May 2018)
  - Phase 3 Customer Support (February – September 2018)
- Work with state agencies to ensure a smooth transition of contract management, services and other related activities.
- Secure a qualified pool of service providers under newly established cooperative contracts.
- Educate customers about the current changes to the software offerings and audits.

# Communication Plan

- Ensure key stakeholders (customers) are provided with information in a timely manner.
- Provide updates on a monthly basis, or as needed on all procurement activities and support for procurement services and transition.
- Attend monthly State Agency Internal Audit Forum (SAIAF) Meetings, as needed.
- Conduct surveys to gauge customer needs for functionalities and satisfaction with TeamMate.
- Set up reminders and provide a tentative dates for availability of software services for procurement.

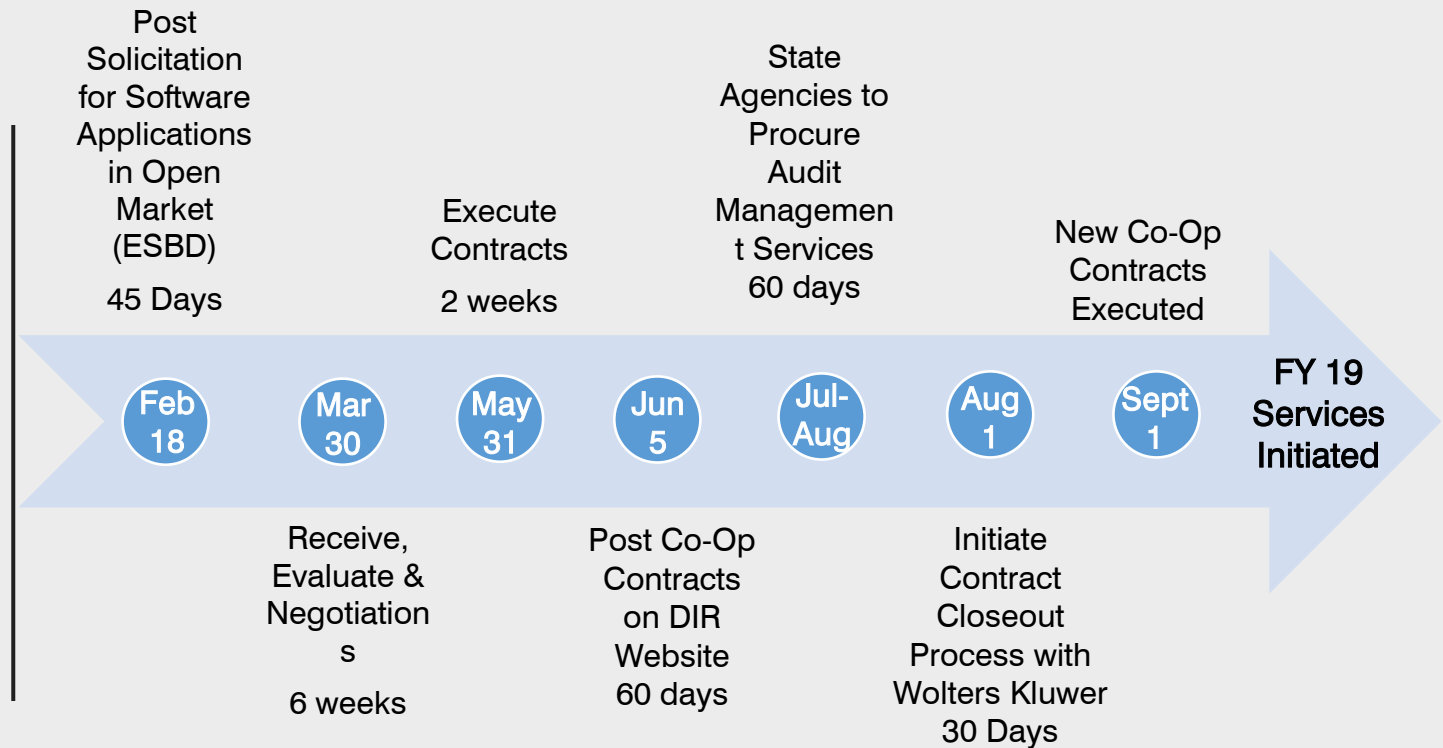


New Procurement  
Necessary For Meeting  
Customer Business  
Needs

# Customer Needs

- Continuation of Services for TeamMate or equivalent for Internal Audit Management Software & Licenses.
- Provide Hosting Services for data storage.
- Professional Services for Training & Implementation.
- Additional options for purchasing data tools and analytics.
- On-premise or cloud services.

# Current Procurement Timeline



# Anticipated Service Offerings

Provide opportunities for securing multiple service providers under Cooperative Contracts Software Applications Services for the following services:

- Audit Management Software
- Licenses
- On-premise or cloud
- Hosting Services
- Professional Services: Training & Implementation
- Data tools & analytics

# Potential Issues & Risks

# Potential Issues

- Wolters Kluwer Financial Services may choose not to submit a bid for a contract.
- Procurement timeframe is constrained to less than 4 months.
- State agencies may have less than 2 months to procure services for FY 19.
- There may be no service providers to meet the current or future business needs for customers.
- Cooperative Contracts may not be available until late Summer (June or July).
- Possible disruption in services during transition from current software provider to new service provider.
- If applicable, sole source procurement may need to be an option in the event DIR is unable to secure a service provider for TeamMate or equivalent.



**QUESTIONS?**

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# Stay tuned...

For more information please contact:

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