



2015 Purchasing Forum & Trade Show

IT Procurement on the Horizon

Opportunities on the Horizon

May 20 & 21, 2015



Contract Information

Project Based IT Consulting Services:

Solicitation Documents can be found at

<http://www.ogs.ny.gov/purchase/biddocument/22772BID.ASP>

Email: ITSProcurement@ogs.ny.gov

IT Umbrella – Manufacturer Based:

Solicitation Documents can be found at

<http://www.ogs.ny.gov/purchase/biddocument/22802bid.asp>

Email: PS_SW_ITF@ogs.ny.gov

IT Umbrella – Distributor Based:

Solicitation currently under development

Email: OGS.sm.SSTTechnology@ogs.ny.gov



Project Based IT Consulting Services



Restricted Period Currently in Effect

Project Based Information Technology Consulting
Services(Statewide)

Solicitation Number: **22772**

Group: **73600**



OGS Centralized Contract: Intent

- To “fill the gap” between the HBITS contracts and the need for a full RFP.
- Centralized contracts will be established with vendors to provide project based information technology consulting services to NYS authorized users on a statewide basis.



OGS Centralized Contract: Details

- 3 year award, plus 2 optional 3 year renewals
- Periodic recruitment
- Standardized vendor requirements
- Standardized terms and conditions
- Contracts expire on the same date
- Maximum not-to-exceed pricing
- Competition at transaction level



In-Scope

Fixed-Price Deliverable-Based Projects including:

- Analysis
- Data classification
- Design
- Development
- Testing
- Quality assurance
- Security
- Associated customized training for IT based applications



Exclusion Examples

- Hardware, software, system, appliance, or cloud offerings
- Equipment sales, web hosting, or ongoing equipment maintenance
- Services performed outside of the continental US
- Staff augmentation



How to Use

- Requires a competitive mini-bid
- Includes defined statement of work
- Mini-bids must be sent to all vendors in the selected lot



Scoping and Lot Selection



*Limited to M/WBEs and SBEs



Mini-Bid: Details

- Terms and conditions that do not conflict with the centralized contract may be added by authorized users
- Speed to market - minimum time between issuance of mini-bid and mini-bid opening:
 - Lot 1: 5 business days
 - Lot 2: 10 business days
 - Lot 3: 15 business days
- Authorized user agreements are subject to OSC post audit



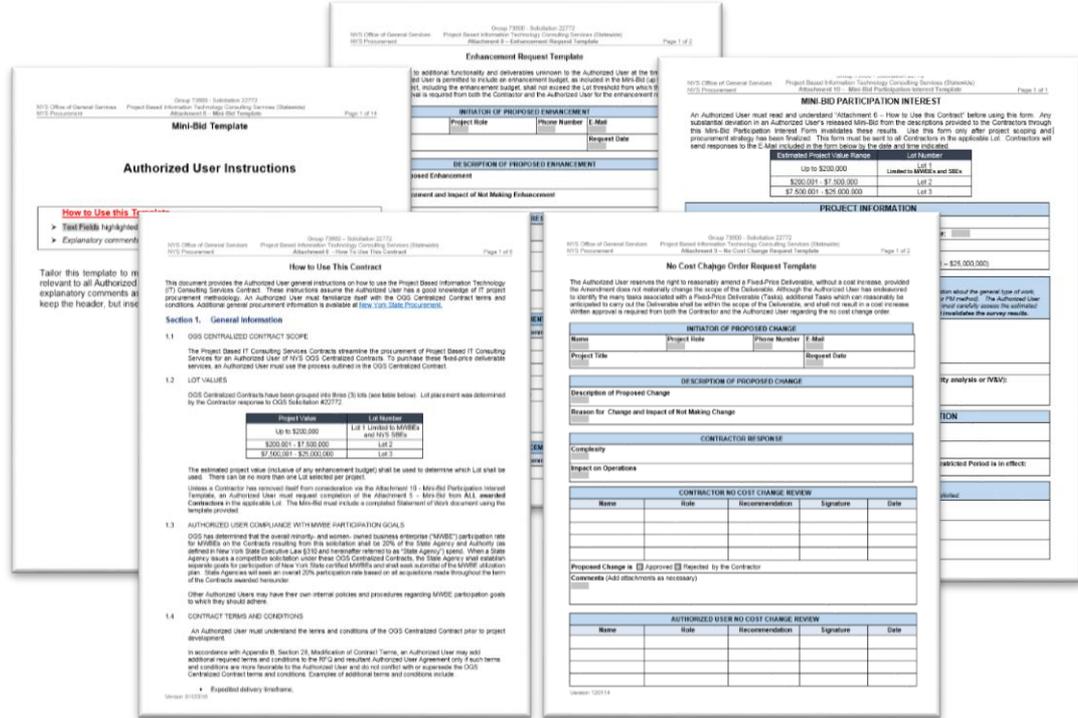
Mini-Bid: Reasonableness of Pricing

- Method of award is flexible (cost or a combination of cost/technical)
- Authorized users may negotiate lower pricing with the tentative awardee
- Authorized user should consider cost reasonableness



Standardized Documents and Templates

- Mini-bid template
- How to use this contract
- Enhancement request template
- No cost change request template
- Mini-bid participation interest template



IT Umbrella Contract – Manufacturer Based



Restricted Period Currently in Effect

Information Technology Umbrella Contract

Manufacturer Based (Statewide)

Solicitation Number: **22802**

Group: **73600**



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Key Benefits

- Mandatory competition
- Speed to market
- Broadens market base
- Periodic recruitment
- Addition of future lots
- Standardized price lists
- Standardized templates
- Detailed “how to use”
- Authorized user training
- Contractor training



Transitioning Centralized Technology Contracts

Software

Storage

Communications
Equipment

Hardware

Enterprise
Systems



Umbrella Contract Components

Software

Hardware

Umbrella

Cloud

Implementation



The Benefits & The Future

The Benefits

- Broadens current market base for:
 - Appliances
 - Cloud
 - Implementation

The Future

- Written to allow for the addition of future lots because technology changes over time.



Lot 1 – Software Includes:

- Perpetual/Term software licenses (e.g. anti-virus)
- Pre-packaged software maintenance/support, installation
- Configuration services
 - Limited to 10% or \$25,000
- Pre-packaged software training (remote and on-site)
- Software license inventory management
- Software bundles
- Enterprise license agreements



Lot 2 – Hardware Includes:

- Appliances (non cloud based)
- IT equipment (servers, notebooks, tablets)
- Telecommunications hardware, system peripherals, & accessories
- Audio/Video conferencing hardware
- Pre-packaged maintenance, support, & installation
- Configuration services
 - Limited to 10% or \$25,000
- Pre-packaged hardware training (remote and on-site)
- Hardware inventory management
- Hardware bundles may include related software
- Imaging and/or loading services
- Remote hardware administration/maintenance
- Enterprise hardware purchases



Lot 3 – Cloud Includes:

- Integrated bundle of cloud services
- Pre-packaged cloud maintenance, support, installation, & configuration
- Pre-packaged cloud connectivity bundle
- Cloud training packages (remote & on-Site)
- E-Learning
- Apps for mobile devices
- Managed security services (including internet traffic monitoring services)
- Cloud asset inventory management
- Enterprise cloud purchases



Lot 4 – Implementation Includes:

Implementation & Configuration Services of Lots 1 – 3

- Business process analysis for new products
- Project management services
- Data conversion
- Customized training on new products
- Programming services capped at 20%
- Enterprise implementation services



Mandatory Competition

- Flexibility for authorized user transactions
- A competitive Request for Quote (RFQ) is required:
 - Across multiple manufacturers and their resellers; or
 - Manufacturer specific when manufacturer has 5 or more resellers
- Restrictions/Considerations:
 - Manufacturer specific RFQ with less than 5 resellers
 - Resellers must be able to quote independently
 - Manufacturer agents cannot be used to show competition

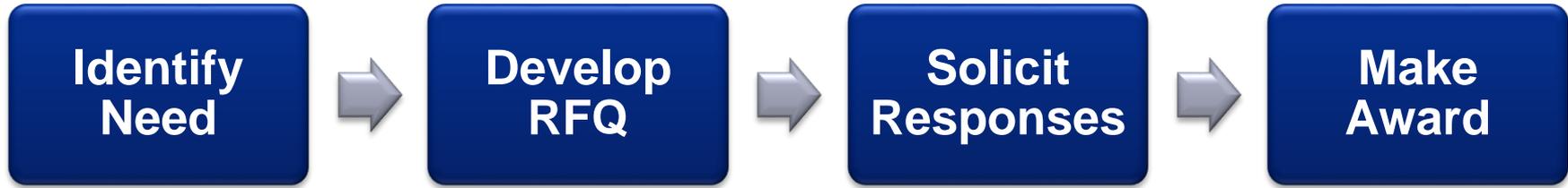


Example Procurement Scenarios

- Manufacturer brand predefined with reseller competition
- Manufacturer brand not predefined, manufacturers and resellers competition
- Lot 4 implementation services only, manufacturers and resellers competition
- Total cost of ownership (pricing factors related to solution)
- Performance based (focuses on results)



RFQ Process



Subject to authorized user policies, procedures and approvals.

Standardized Documents and Templates

- Terms and conditions
- Price lists
- How to use
- Request for Quote with statement of work
- Financial response

The collage displays several key procurement documents:

- Solicitation Notice:** A document from the State of New York Executive Department, Office of General Services, dated 5/20/15. It details a solicitation for Information Technology Umbrella Contract - Manufacturer Based (S03-26-15) and includes contact information for Sharon Featherstone and Karen Foster.
- Request for Quote (RFQ) Form:** A form with sections for Authorized User Information, Request for Quotes Number, Vendor Information, and Request for Quotes Grand Total. It includes a table for item details with columns for Item Number, Description, Units, Price, and Total Price.
- Authorized User Instructions:** A document explaining the requirements for authorized users, including the need to complete the RFQ and provide a statement of work.
- Contract Template:** A document titled 'Contract General' with sections for 'REQUIRED COMP' and 'ITEMS'. It includes a table for item details and a section for 'REQUIRED COMP' with a table for item details.



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IT Umbrella Contract – Distributor Based



Restricted Period currently in effect

Information Technology Umbrella Contract

Distributor Based (Statewide)

Solicitation Number: **22876**

Group: **73600**



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Lot Structure & Highlights

Lot Structure

Miscellaneous Software

Miscellaneous Hardware

Highlights

- Open to distributors of hardware & software only
- Manufacturers are not eligible for contracts
- Mandatory competition amongst distributors (RFQs)

Lot 1 – Software Distributors Only Includes:

- Perpetual/Term software license (e.g. anti-virus)
- Pre-packaged training
- Pre-packaged installation
- Pre-packaged maintenance and support



Lot 2 – Hardware Distributors Only Includes:

- Appliances/Storage (non-cloud based)
- Server & mainframe hardware
- Telecommunications hardware
- Peripherals & accessories
- Desktop | Workstation | Laptop | Tablet
- Audio/Video conferencing hardware



Goals & Key Benefits

- Speed to market
- Addition of future lots
- Templates and training
- Competition among vendors
- Offers miscellaneous hardware and software



Goals & Key Benefits Continued

Vast Range of Products

- Contract is intended to include ALL software and hardware products not available under other centralized contracts.

Broaden Current Market Base

- Miscellaneous Hardware
- Appliances



Contract Exclusions

- Products on other centralized contracts
- Stand-alone professional services
- SKUs that equate to “blocks of hours”
- Cloud offerings



Mandatory Competition

- A competitive Request for Quote (RFQ) is required
- All contractors within a lot must be solicited for quotes
- Standardized RFQ templates



Wrap-Up



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How Can We Help You?

- What training do you want?
- Where do you want training?
- How do you want to be trained (webinars, videos, in-person)?
- Do you have templates to share?



Contact Information

Presenters: Allison White | Sharon Featherstone | Dewan Bristo

Contact us today

(518) 474-6717

customer.services@ogs.ny.gov

Find procurement resources:

www.nyspro.ogs.ny.gov



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Questions?



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