



2014

Purchasing Forum & Trade Show *Planting Seeds Today for Tomorrow's Success*



Andrew M. Cuomo
Governor
State of New York

RoAnn M. Destito
Commissioner
Office of General Services

A watercolor-style illustration of a tree with green foliage and brown branches, positioned on the left side of the slide. The foliage is composed of various shades of green, from light to dark, with some darker spots and splatters. The branches are thin and brown, extending from the bottom left towards the top right.

Best Practices for IT Procurement

May 14-15, 2014

Agenda

- New Legislation
- Form, Function and Utility
- ITS and DOB Approval
- OGS Contracts and RFQ's
- Creating a Good Scope
- Open Market
- Future of OGS Technology Contracting
 - Project Based Consulting
 - Umbrella Contract
 - Escalator Contract

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Session Objectives

The objective of this session is to understand the following concepts:

- Forward Thinking Technology Procurement vs. Previous Technology Procurement Methods
- Importance of Stakeholder Input
- New Contract Needs vs. Replacement Contracts
- Achieving Cost Savings
- Avoiding Pitfalls

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New Legislation

- Preferred Sources
- Mandatory use of OGS Technology & Service Contracts
- S/MWBE Goals
- Disabled Veterans (Pending Regulations)

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Form, Function, Utility

- Preferred Sources and OGS Contracts
- What Procurement Record documentation is required when existing contracts do not meet agency criteria
- Contact NYSPRO to determine if the product or service can be added to an existing contract
- Open Market/Discretionary procurement and compliance with NY State Finance Law section 163
- Compliance with NYS Procurement Council guidelines
- Failure to plan does not justify not meeting criteria

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ITS and DOB Approval

- Obtain required approvals from NYS Office of Information Technology Services (ITS) and NYS Division of Budget (DOB)
 - Plan To Procure (PTP)
 - IT Investment Request (ITIR)
 - DOB B-1184
- To ensure State Agencies and public entities get the best price possible IT procurement requests should be submitted to the NYSPRO Information Technology Buy Desk for review

OGS Contracts and RFQ's

- Speed to Market
- Procurement Efficiency
- Negotiated “Terms and Conditions”
- Aggressive “Not to exceed pricing”
- Maximized savings by following contract directions
- Annualized spend
- Competitive RFQ's generate greater savings

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OGS Contracts and RFQ's (continued)

- Cost Savings
- Release an RFQ across manufacturer specific contracts
- Release an RFQ to resellers under a specific manufacturer
- Negotiation

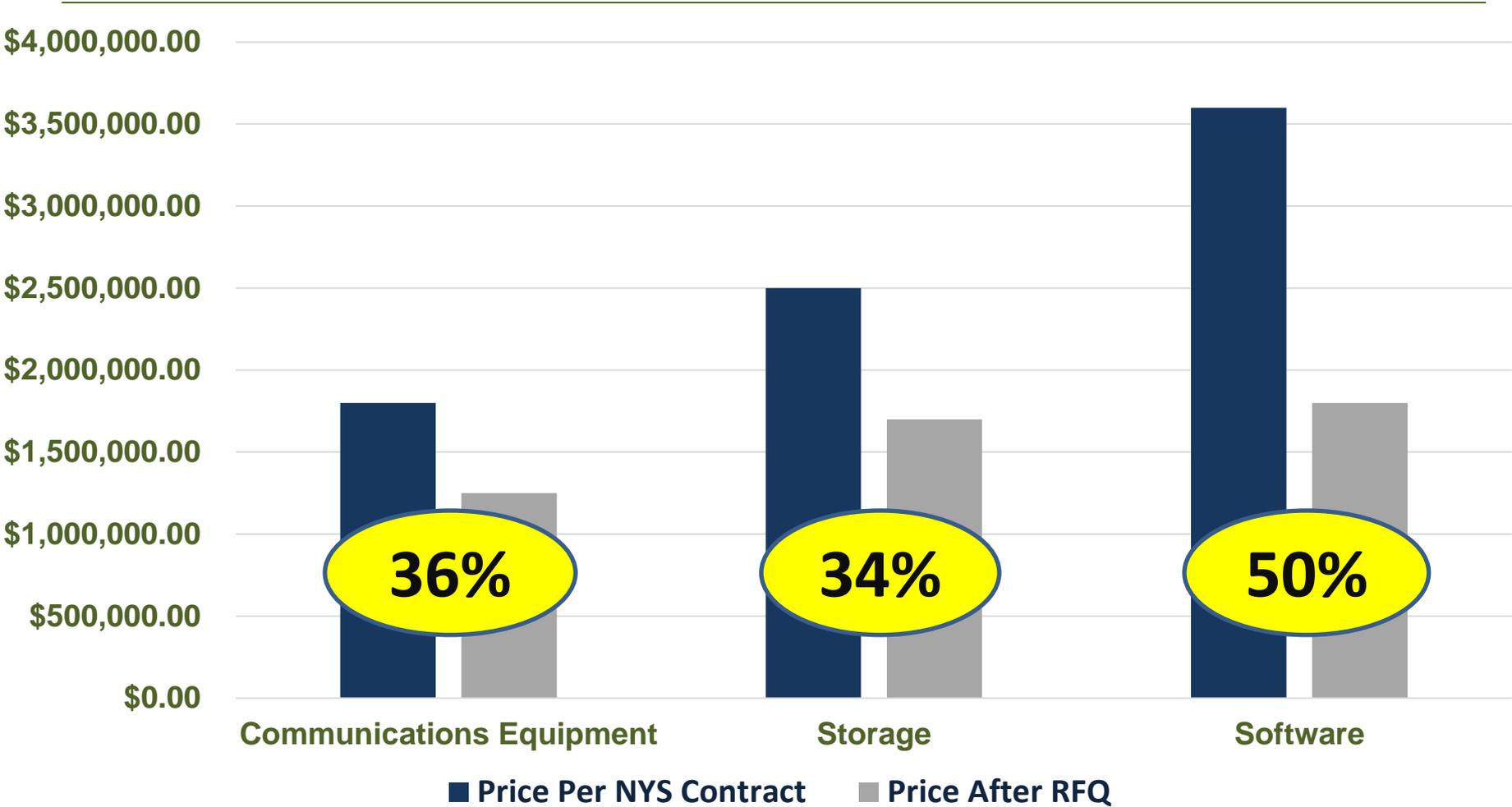
If you need further assistance, RFQ templates or more specifics, please contact the NYSPRO IT Procurement Team

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Recent RFQ Savings



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Creating a Good Scope

- Good scoping is important in both OGS Contracts and open market buys
- Scoping should include all goods and services needed for at least a 12 month time period
- Contracts for time and materials should be avoided if other options are available

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Creating a Good Scope (continued)

- Use deliverable based opportunities whenever possible
 - Payments should always be linked to completion of specific tasks or milestones
 - Weekly reports or hours worked are not considered milestones
- Use HBITS for staff augmentation services

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Open Market

- For products or services currently not available via Preferred Sources or OGS contracts
- Utilize Small, Minority and Woman Owned Business Entities (SMWBE up to \$200K)
- Discretionary
- Complex, unique needs
- Time intensive
- Seek assistance from procurement experts at NYSPRO, OSC and ITS!

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Future of OGS Technology Contracting

Three (3) innovative new procurement vehicles are planned for 2014-15

- Project Based IT Consulting Services
- Umbrella Contract
- Escalator Contract

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Project Based Consulting

- Watch the NYS Contract Reporter in May/June for the anticipated release of a new RFC!
- General Goals:
 - Compliment to HBITS Contract
 - Speed to market
 - **COMPETITION!**
 - Allows a team approach for solutions
 - Links payment to completion of services

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The Umbrella Contract

- Single set of standardized terms and conditions for all manufacturers
- Six (6) modules planned
 - Appliances
 - Cloud Services (SAAS...)
 - Connectivity
 - Implementation Services
 - Hardware
 - Software
- Additional modules to be considered in the future
- Resellers are strongly encouraged to participate

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The Escalator Contract

- Three (3) modules planned
 - Cloud
 - Hardware
 - Software
- Three (3) resellers per module
- Mandated competition at specific thresholds
- Watch NYSCR for Escalator RFI!

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QUESTIONS



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Information Technology Buy Desk

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