



Purchasing Forum & Trade Show

IT Umbrella Manufacturer: Buy IT Products & Services

May 18 & 19, 2016



Agenda

Today you will learn:

- How to use this contract
- Where to find helpful resources
- Who to contact for questions

Speakers:

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What Can I Use This Contract For?

- The IT Umbrella gives you the ability to buy IT products and the professional services needed to install and operate those products, including cloud services.
- It is grouped into 4 categories or lots: software, hardware, cloud, and implementation services.
- You can buy from one or more of the lots and group the purchases into a single transaction.
 - This means you can purchase hardware, software, and IT service professionals to come implement the solution from a single RFQ.



What Can You Use This Contract For?

- Request for quotes (RFQ) are used to get pricing from manufacturers on contract and their approved resellers.
- It includes periodic recruitment, which means that more products will be available to meet your business needs.
- It is flexible so that future lots may be added for new technologies as they become commercially available.
- You can get a team of experts to implement products and train staff for up to 36 months.



Where We Are

By the Numbers

- 125 bids received
- 55 contracts posted
 - Lot 1 (software): 35
 - Lot 2 (hardware): 31
 - Lot 3 (cloud): 25
 - Lot 4 (implementation): 31
- Additional contracts awarded daily

Training & Resources Focus

- Training for agencies underway
- Training for contractors coming soon
- Live training available upon request
- Online resources being developed



Manufacturer Based IT Umbrella Process Overview



1. Develop your RFQ

There are two types of RFQs for this contract...

Basic RFQ

- Used for less complicated purchases.

Get the forms, templates & how-to guide online at:
www.ogs.ny.gov/purchase/snt/awardnotes/7360022802can.HTM

Complex RFQ

- Used for complex projects such as software or hardware integration, multi-phased projects.
- This RFQ requires additional information (statement of work, deliverable-based implementation).

1. Develop your RFQ

Both RFQ templates include...

- Make sure to delete the instructions!
- Cover:
 - Standard RFQ details such as RFQ name, number, authorized user information, etc.
- Project details:
 - Scope/mandatory requirements
 - Authorized user terms and conditions
 - Optional authorized user dispute resolution process
- Manufacturer/reseller information – that's completed by the bidder.

Consider including:

- Contract SKUs
- Delivery requirements
- Necessary qualifications, including training, licenses, and permits
- Hardware and software environments
- Installation date
- Systems to integrate with
- Fiscal year budget/legislative deadlines
- Statement of work
- Timelines and deliverables

1. Develop your RFQ

A complex RFQ also includes....

- Scope/mandatory requirements
- Statement of Work
- Authorized user terms and conditions
- Optional authorized user dispute resolution process

A good statement of work includes:

- Milestones, timeframes
- Dependencies
- Roles and responsibilities
- Background checks, additional insurance
- Delivery payment points
- Key personnel interviews
- Location where work will be performed
- Risk projections and mitigation strategies
- Uptime
- Response time
- Security conditions
- Disaster recover, business continuity plans
- Data transfer services
- Chargebacks, liquidated damages and/or penalties



2. Release the RFQ by notifying contractors, their approved resellers & collect responses

- There are two ways to distribute your RFQ via email:
 - To a specific manufacturer and all of their approved resellers
 - Only do this when you have specific technology requirements and you can justify the specific manufacturer.
 - The manufacturer must have five or more approved resellers.
 - To all manufacturers and all of their approved resellers
- Where can I find the contractor and reseller emails?
 - Use our new email distribution lists found on the contract page.



Reseller Mailing List

Contract Number	Manufacturer Name	Reseller Name	Federal ID No.	SFS ID No.	Contact E-Mail Address1	Lot 1 Software	Lot 2 Hardware	Lot 3 Cloud	Lot 4 Integ.	SBE	MBE	WBE	SDYOB
PM67316	Accenture LLP		72-0542904	1000042525	megan.n.atchley@accenture.com	X			X		X	X	
PM67316	Accenture LLP	Complink Technologies Inc	11-2967448	1000000634	Denise@compu-link.com	X			X	X			
PM67316	Accenture LLP	nFrastructure technologies Inc	22-3771456	1000017165	timothy.fazoly@nfrastucture.com	X			X				
PM67316	Accenture LLP	SHI International Corporation	22-3009648	1000008811	dean_howell@shi.com	X			X				
PM67316	Accenture LLP	Technica Corp.	54-1582535	PENDING	lbeckert@technicacorp.com	X			X				
PM67316	Accenture LLP	Unique Comp Inc	11-3411202	1000012266	gttooley@uciny.com	X			X				
PM67378	Admit Computer Services, Inc.	This Contract does not contain Resellers	11-2524979	1000005704	dlabriola@impact-sys.com	x							
PM21020	Aerohive Networks Inc.		20-4524700	1100133105	mifleming@aerohive.com		X			X			
PM21020	Aerohive Networks Inc.	CDW Government LLC	36-4230110	1000009217	yolanda.blomquist@cdw.com		X						
PM21020	Aerohive Networks Inc.	Computer Connection of CNY DBA CCNY Tech	16-1397143	1000039819	paul.slegaitis@ccnytech.com		X				X		
PM21020	Aerohive Networks Inc.	Custom Computer Specialists Inc	11-2497640	1000005692	rcadiz@customonline.com		X						
PM21020	Aerohive Networks Inc.	Dell Marketing LP	74-2616805	1000041162	lorri_bailey@dell.com		X						
PM21020	Aerohive Networks Inc.	GovConnection Inc	52-1837891	1000009448	lrussell@govconnection.com		X						
PM21020	Aerohive Networks Inc.	IKON Business Group Inc	32-0018186	1100146782	ken@ikonbusinessgroup.com		X						
PM21020	Aerohive Networks Inc.	Layer 3 Technologies Inc	03-0422047	1000010986	dfenlon@layer3direct.com		X			X		X	
PM21020	Aerohive Networks Inc.	Network Experts of New York Inc	26-3694379	1100064023	amcgowan@netxny.com		X					X	
PM21020	Aerohive Networks Inc.	Network Outsource Inc	11-3582091	1000034543	hweinstein@networkoutsource.com		X			X			
PM21020	Aerohive Networks Inc.	Ronco Communications & Electronics Inc	16-0905768	1000007574	bhansen@ronco.net		X			X			
PM21020	Aerohive Networks Inc.	SHI International Corporation	22-3009648	1000008811	Amanda_Calimano@shi.com		X						
PM21020	Aerohive Networks Inc.	Tailwind Associates	14-1770964	1000001841	bpardee@trailwindassoc.com		X			X			
PM21020	Aerohive Networks Inc.	Vandis Inc	11-2650266	1000011819	asegal@vandis.com		X						
PM21020	Aerohive Networks Inc.	Whalley Computer Associates Inc	04-2902969	1100041604	smc@wca.com		X			X		X	

3. Evaluate responses & make final determination

- Evaluate the responses based on what you included in the RFQ (lowest cost vs. best value).
 - Your evaluation tools cannot be altered any time after the RFQs are issued.
- What happens if you receive less than three responses?
 - Follow these general guidelines from the Office of the State Comptroller:
 1. Were the RFQ specifications too narrow for the pool of responders?
 2. Canvass the vendors that didn't respond and ask why.
 3. Does the RFQ need to be revised and reposted?
 4. Document decisions for the procurement record.



4. Notify all contractors who responded

- Make sure to notify the tentative awardee and non-awardees. Email is best!
- **What does success look like?**
 - Clarify your scope, including goals and objectives with the tentative awardee. The more you both understand the project, the better the results will be.
- Don't be afraid to negotiate for a better price as you finalize your user agreement, **without changing the project scope in the RFQ.**

5. Finalize your procurement record

Depending on the Authorized User's procurement process, the following are documents you may want to include in the final procurement record:

- RFQ documents
- Evaluation criteria
- Distribution lists
- RFQ responses
- Completed evaluation score sheet and summary
- Awarded RFQ
- Rejected RFQs with justifications
- Tentative award letter
- Final Agreement (Purchase Order)



Remember: We're Here to Help

Manufacturer IT Umbrella

MfrUmbrella.AuthorizedUsers@ogs.ny.gov



Helpful Resources

- Contract page:
 - www.ogs.ny.gov/purchase/snt/awardnotes/7360022802can.HTM
- How to use guide:
 - www.ogs.ny.gov/purchase/snt/awardnotes/7360022802HowToUse.pdf