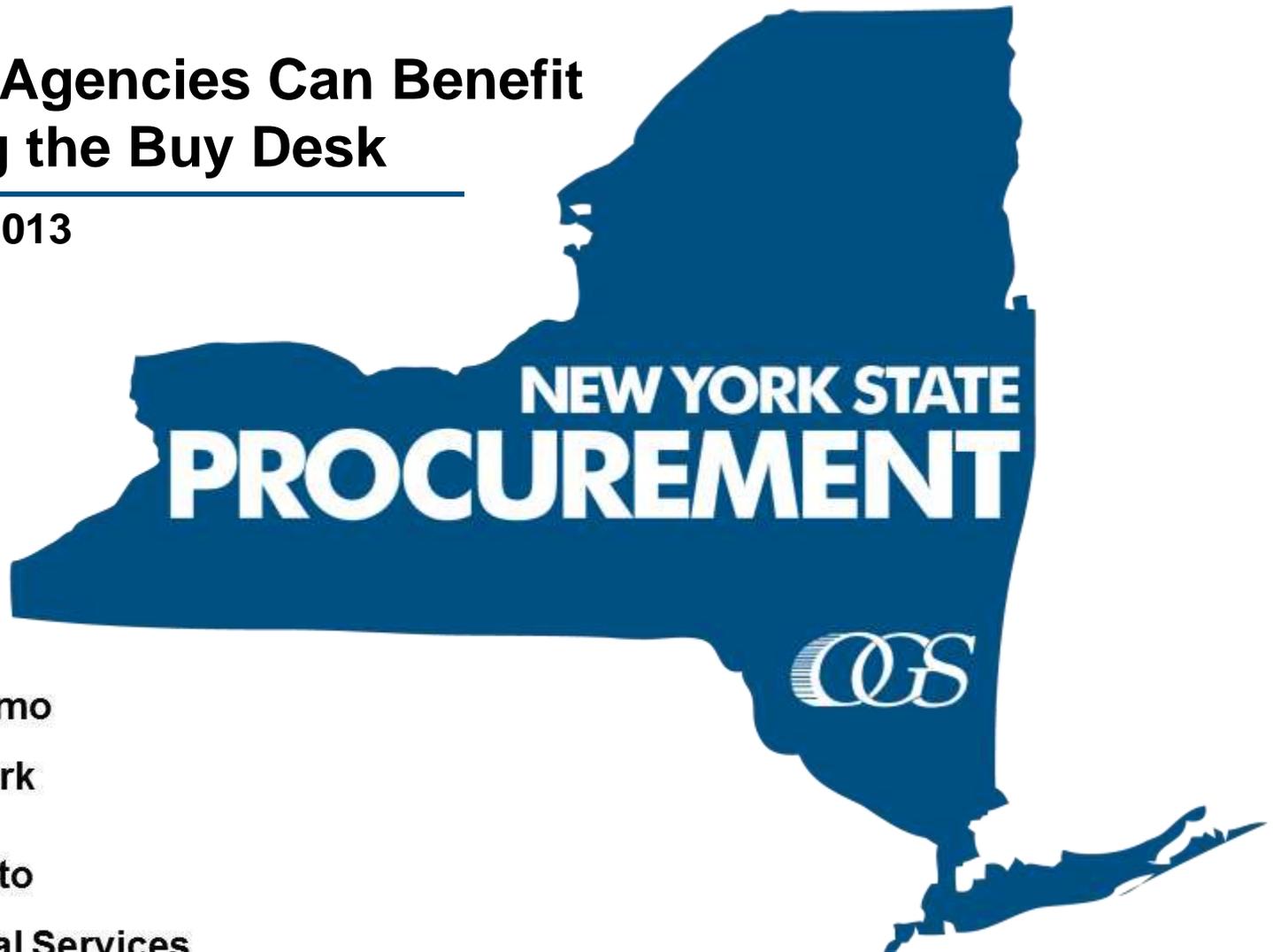


**SAVE!**

**How State Agencies Can Benefit  
from Using the Buy Desk**

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**May 15 & 16, 2013**



**Andrew M. Cuomo  
Governor  
State of New York**

**RoAnn M. Destito  
Commissioner  
Office of General Services**



# Assisted Buy Desk

Piecing Together Savings for NYS Agencies



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# Agenda

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- Who is the Assisted Buy Desk?
  - Why is there a Buy Desk?
  - Process at the Buy Desk?
    - Submittal
  - Review and Determination
    - **SAVE**
  - Questions?



# *Who is the Buy Desk?*

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# Who is the Buy Desk?

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## ABD Sponsors

John Traylor, Chief Procurement Officer

Mary McGinty, Director

Christine Irvine, Assistant Director

Team:	Name	Phone #:
Buyer	Michelle St. Jock	518-474-3922
Buyer	Christine Brady	518-474-9867
Buyer	Allison White	518-473-3925
Team Email	SST_AgencyBuyDesk@ogs.ny.gov	
Webpage	<a href="http://www.ogs.ny.gov/BU/PC/">http://www.ogs.ny.gov/BU/PC/</a>	



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## ***Why is there a Buy Desk?***

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The Governor's Office supports procurement transformation.

2011:

- An assessment of NYS purchasing was completed.



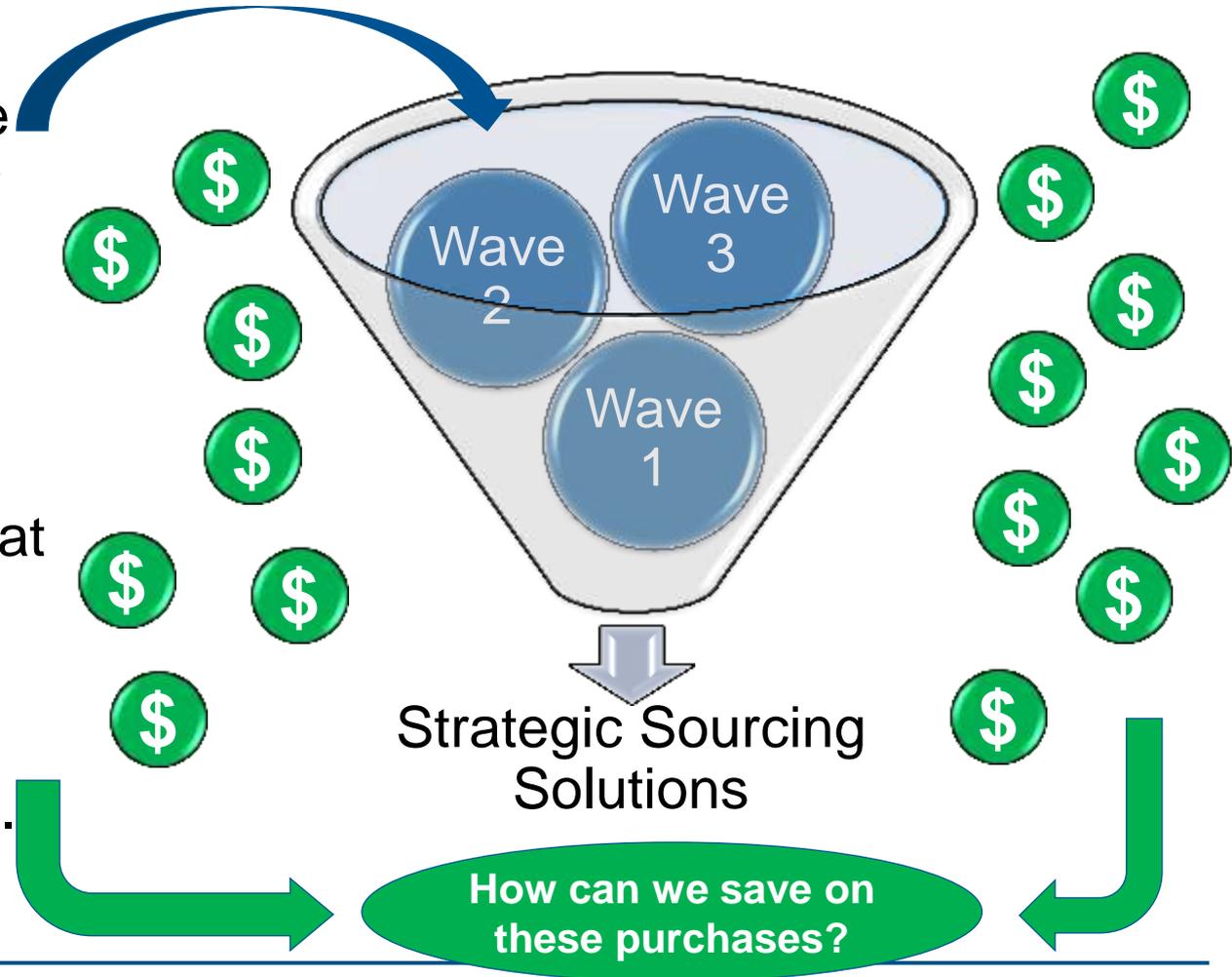
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# Why is there a Buy Desk?

From the Assessment, a Need was Found

**The Assisted Buy Desk was created to fill a need**

- Waves were established to create savings solutions for high dollar volume contracts.
- Purchases not currently in scope
- Urgent purchases that cannot await the sourcing solution
- Unique high-value individual purchases.



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## ***Why is there a Buy Desk?***

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- Governor Cuomo announced the New York State Procurement Transformation Project: Strategic Sourcing
- The Strategic Sourcing Team (SST) was formed.
- Wave I Announcement (June 2, 2011)
- Wave II Announcement (February 22, 2012)
- ABD Announcement (February 22, 2012)
- Wave III Announcement (January 3, 2013)



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## ***Why is there a Buy Desk?***

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**The Assisted Buy Desk is a NYSPRO centralized purchasing team established to achieve savings for agencies at the purchasing or transaction level.**

The team focuses on tactical purchasing activities by State agencies in order to:

- identify opportunities for savings,
- support agency negotiations, and
- improve pricing on individual purchases.

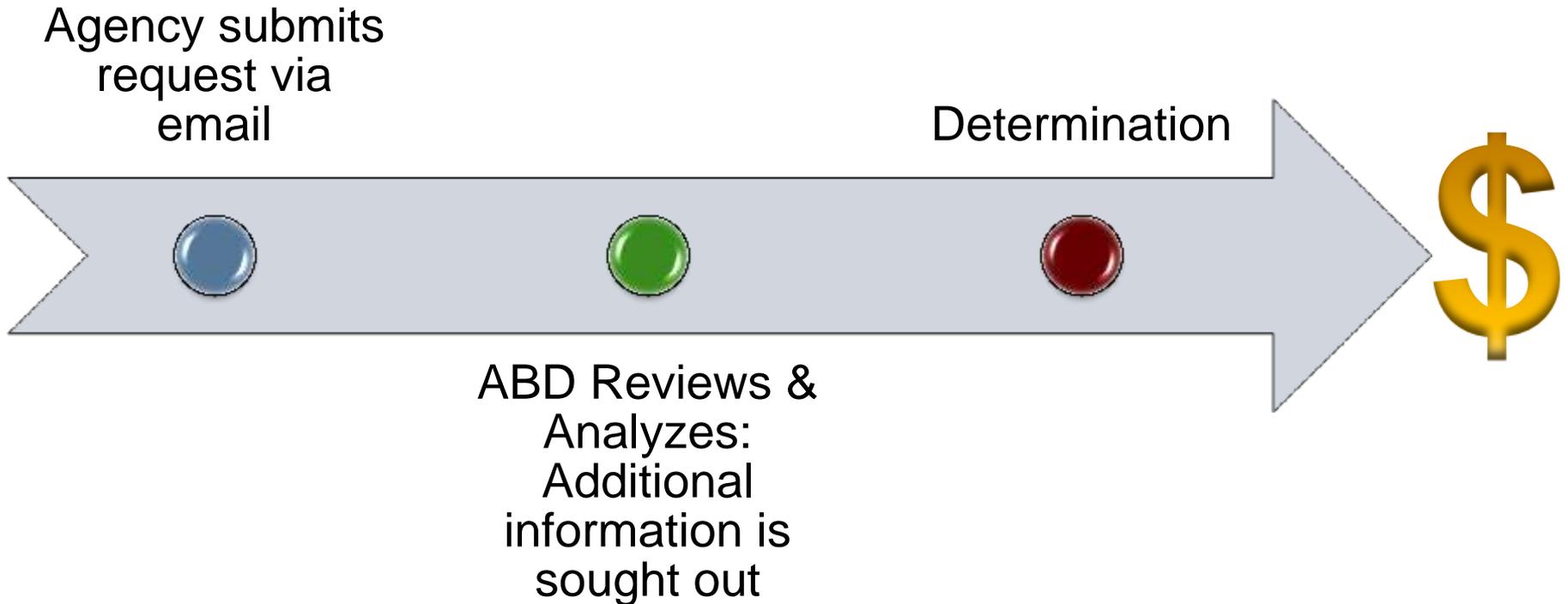
**The ABD has  
an annual  
savings goal  
towards the  
State's  
Financial Plan**

We are not a control agency and do not “approve” transactions like the Office of the State Comptroller or the Division of the Budget.

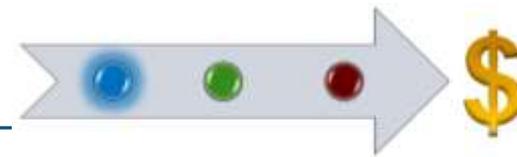


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# The Process at the Buy Desk



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- All Executive Agency purchasing is within scope:
  - **Contracts:** All solicitations, RFPs, IFBs, mini-bids, single and sole source, extensions (including no-cost extensions), etc.
  - **Purchasing:** Any purchase over \$20K, regardless of whether a centralized contract is being used, should be submitted to the Buy Desk.
- **The following exceptions require no contact with the Buy Desk:**
  - travel,
  - issue of grants,
  - capital projects,
  - membership dues,
  - conferences fees,
  - preferred source purchases, and
  - purchases utilizing completed sourcing categories / contracts



# Submittal



- Requests should be submitted by Agencies and:
  - Provide complete information:
    - Term of contract;
    - Cost containment or price adjustment (CPI / flat);
    - Current intention: plan to quote among resellers etc.
  - **Be submitted as early as possible, with at least two weeks in advance of the anticipated purchase date;**
  - Do not submit purchases for already obligated payments / services already rendered.
  - Reflect the full purchase value for the duration of the procurement being submitted.



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# Submittal: ABD Request Template



Assisted Buy Desk Agency Request Form

Version  
3.6.12

**Instructions:**

Agencies should complete a new form each time they submit opportunities to the Assisted Buy Desk. Once you submit an opportunity, please do not include it on the request form again. Complete the sheet by filling in all of the shaded cells. Instructions about the completion of each field are listed in grey below each field.

**Do Not** resubmit responses

Request Date

Agency Name

Agency Name	Agency Contact	Vendor	Request Description	Estimated Cost \$
Auto fill from above	Who to ask questions about this opportunity	If already planned, who you intend to purchase the product from	Description of product to be purchased	Expected expense based on past purchase, quote or market knowledge
Example Response	Jane Doe	ABC Widgets Inc	A Case of flying widgets	\$ 200.00



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# Submittal: ABD Request Template



Fund Type	Historical Discounts received	Last Price Comparison	Targeted Procurement Date	Latest Possible Procurement Date
Choose from drop down menu (GF, SRO, SRF, ISF, Multi)	Describe any discounts that have been received for this item	last price received (purchased, quote, etc.)	Date that you intend to make the purchase	Latest date that the procurement can be made. Please explain in notes
SRO	20% off list price	\$100 each quote	3/15/2012	3/30/2012



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# Submittal: ABD Request Template



B-1184 # if applicable	Purchase Type	Contract # if Applicable	Is vendor MWBE?	Procurement Method
B-1184 number	Choose from drop down menu. If Renewal/annual detail comparison to previous purchase	Contract numbers available for item	Choose yes/no from drop down	Choose from drop down how item will be procured (IFB, RFP, Contract Negotiations)
	Annual/Renewal	C1111	No	RFP



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# Submittal: ABD Request Template



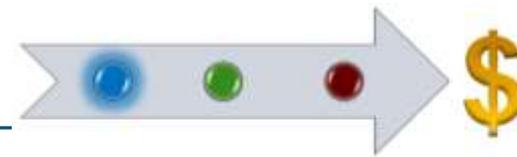
Procurement Status	Accompanying Documents	Notes	Submission Date
Choose from the drop down menu	Provide the name of any documentation that is being provided along with this request	Add any additional detail about procurement here	Auto fill from above
3-Existing Contract	ABCWidgetsQuote.doc	We have attached vendor's most recent quote to this f	1/31/2012



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# ***Submittal: Tips***

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- What does a good submission look like?
  - Request date is the date the email is submitted to the Buy Desk
  - Numbers only in dollar amount fields
  - Dates only in date fields (No ASAP, N/A)
  - Provide complete information (no blanks unless it is not applicable)
  - Information to include in the Notes field:
    - Term of service/contract start and end date;
    - How many quotes were received?
    - Any historical discounts received with purchase;
    - Clarify any urgent needs related to the purchase.
    - Any information you would have included in dollar or date fields that isn't numbers.



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# **Submittal: Updated Template**



Microsoft Excel  
Worksheet

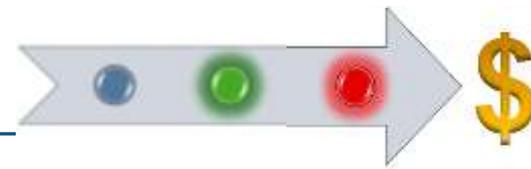
- Designed based on user feedback
- No longer locked
  - The information returned is pulled into our master spreadsheet.
  - Please do not alter columns or order of columns.
- Instructions on separate tab instead of taking viewing valuable space
- Removal of B-1184 column
- Removal of Historical discount received column
  - If different information than Last Price Comparison, please put into notes section.
- Dates relocated to be grouped together



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# ***Review & Determination***

## *What to Expect from the Buy Desk*



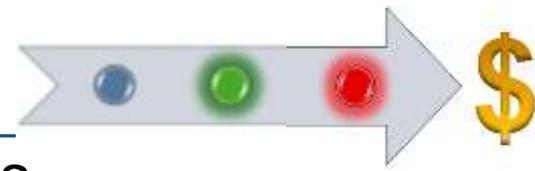
- Initial response should be within 2-4 days. Possibilities include:
  - Request for more information
  - Proceed with purchase
  - Hold for centralized contract availability
  - Assisted Buy Desk to assist
  - Release
- Buy activities and timelines will vary. The Buy Desk will communicate our expected timeline, other involved parties, and expectations for/needs from agency.



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# **Review & Determination**

## ***ABD Strategies & Common Recommendations***



### Quoting ALL Vendors/ Resellers

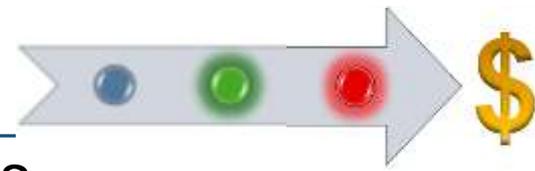
- Many agencies have saved money on purchases by conducting a competitive exercise, or RFQ – request for quote.
- Buy Desk will recommend quoting from more than the normal three.
- In the case of Miscellaneous Software, there are recommended dollar amounts when you need only get one quote, vs. are required to quote all 3 Vendors – Buy Desk will always recommend quoting all three.



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# Review & Determination

## *ABD Strategies & Common Recommendations*



### ABD Strategies:

- Aggregate volume across agencies;
- Adjust timing of purchase;
- Collaborative purchasing with other agencies;
- Compete purchases with vendors and resellers on behalf of agencies.



Cost Escalation: assist with clause/ language used in contract or P.O.

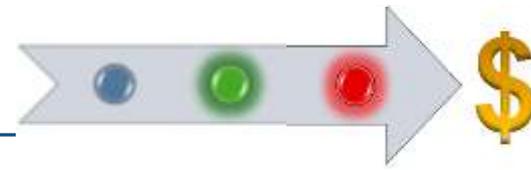
CPI Calculation: possibly based on the wrong metrics or for the wrong location



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# Review & Determination

## *Lessons Learned when Assisting*



### TIMING IS KEY:

- All agencies will not be prepared to purchase at the same time.



- COMFIRM VENDOR BUY IN: All Vendors do not make a “best and final” offer other than exact contract pricing.
  - Selected SW Vendors
  - Automated Electronic Defibrillator’s (AED’s)



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**SAVE**

**Results of the Buy Desk**



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# **SAVE**



## *How much has the Buy Desk **SAVED**?*

- As of March 2013, Buy Desk involvement has saved agencies \$5.9M.
  - This is without full agency participation.
  - With full participation, this number will multiply!
- Miscellaneous Software
  - Cisco: ABD reached out to agencies for inclusion into an aggregated buy for equipment and issued a Request for Quotation (RFQ) to Value Added Resellers (VAR) for the combined volume.
  - Oracle: Multiple agency purchases were aggregated and expedited with ABD assistance and a greater discount was realized as a result of the higher volume.



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# Questions

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# ***Frequently Asked Questions***

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## ***What is the Assisted Buy Desk?***

The Assisted Buy Desk (ABD) is a centralized purchasing team established to achieve savings for agencies at the purchasing or transaction level. The team focuses on tactical purchasing activities by State agencies in order to identify opportunities for savings, support agency negotiations, and improve pricing on individual transactions.

## ***Why has the Assisted Buy Desk been established?***

As part of the Procurement Transformation team's data collection efforts, the State identified numerous opportunities to secure additional savings on select purchases across agencies. The ABD aims to capture that savings, particularly in areas not yet addressed through its Strategic Sourcing efforts or in high-value individual purchases.

## ***How is the Assisted Buy Desk different from the rest of NYS Pro?***

The Assisted Buy Desk is a supplemental capability to the Sourcing Projects being implemented by NYS Pro. The ABD is guided by the same principles of leveraging the State's buying power and making procurement decisions based on factual market data and quantitative analysis. The Buy Desk differs in that it is focused on more tactical single-agency purchases and immediate savings opportunities.

## ***How will the Assisted Buy Desk save my agency money?***

The Assisted Buy Desk has purchasing visibility across agencies and can assist agencies with pricing negotiations under specific contracts or discretionary purchases where there may be an opportunity to aggregate spend across multiple agencies. ABD can also inform agency staff about timing of purchases vis-à-vis new or renewed centralized contracts, as well as specific Strategic Sourcing vendor negotiations.



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## **Frequently Asked Questions (cont'd)**

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### ***Is my agency required to participate in Assisted Buy Desk activities?***

Agencies should contact the Buy Desk and submit a request for any purchase that is within scope of the Buy Desk, provided on the *When to Contact the Buy Desk* document. The Buy Desk will work with the agency to determine whether the agency should temporarily suspend the purchase until contract development in that category is completed and a new solution is available, if the purchase is a candidate for Buy Desk assistance, or if the agency should proceed on its own.

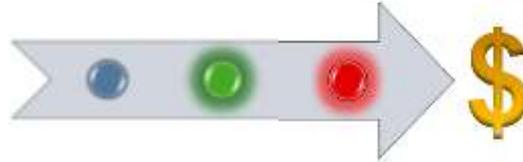
### ***Will the Assisted Buy Desk increase the time it takes for my agency to conduct a procurement?***

Buy Desk review of agency purchases should assist in expediting the B-1184 approval process. The intent of the Buy Desk is to move quickly to assist agencies. Agencies should contact the Buy Desk for a determination regarding a specific purchase after all internal agency and external programmatic approvals have been received (e.g. Agency Head sign-off and PTP, if applicable). Much delay can be avoided by completely filling out the request template and submitting requested information back to the Buy Desk in a timely manner.

### ***Who will issue the final purchase order or contract after Buy Desk activities?***

Agencies will still be responsible for processing individual purchase orders or contracts.





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