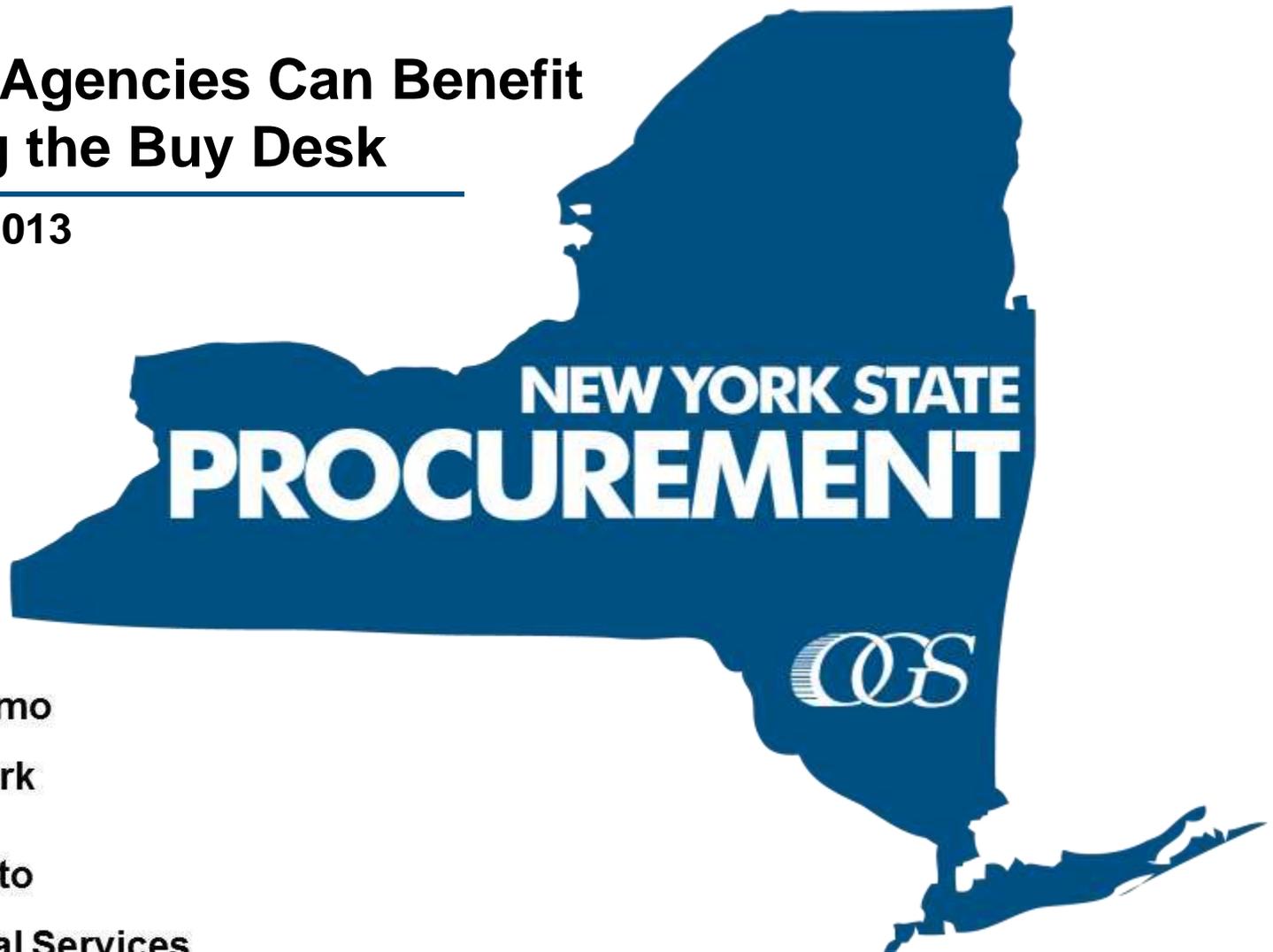


**SAVE!**

**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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## Purpose of the Assisted Buy Desk

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

The team tactically focuses on 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**

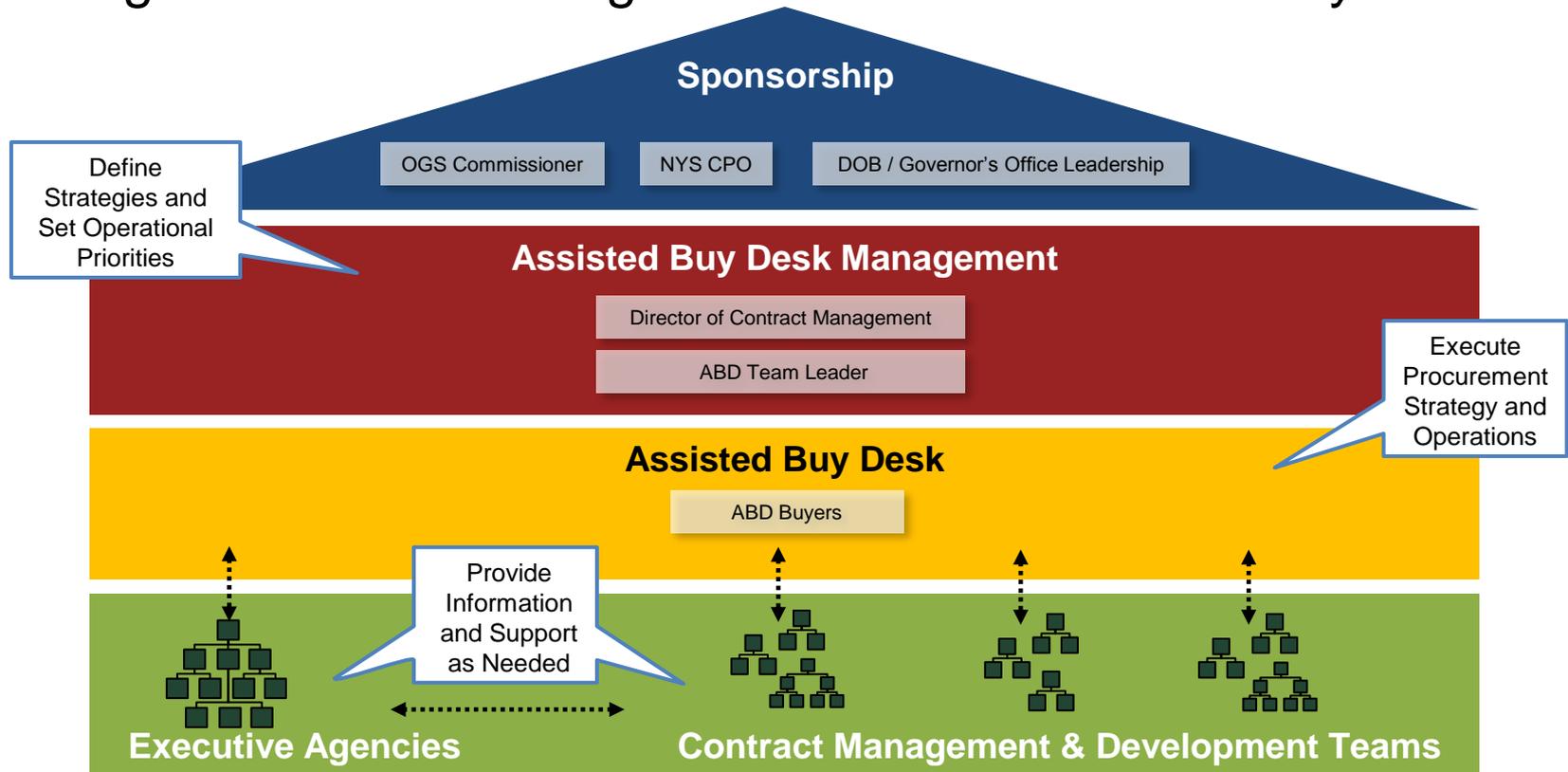
We are not a control agency and do not “approve” transactions like the Office of the State Comptroller or the Division of the Budget.



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# ABD Governance Structure

The Buy Desk governance structure identifies those with the authority to define strategies & make key decisions, and provide oversight to ensure strategies are executed consistently.



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# The Buy Desk Team and Support



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



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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?
- How does the Buy Desk **SAVE**?
- Submitting requests to the Buy Desk
  - Questions?

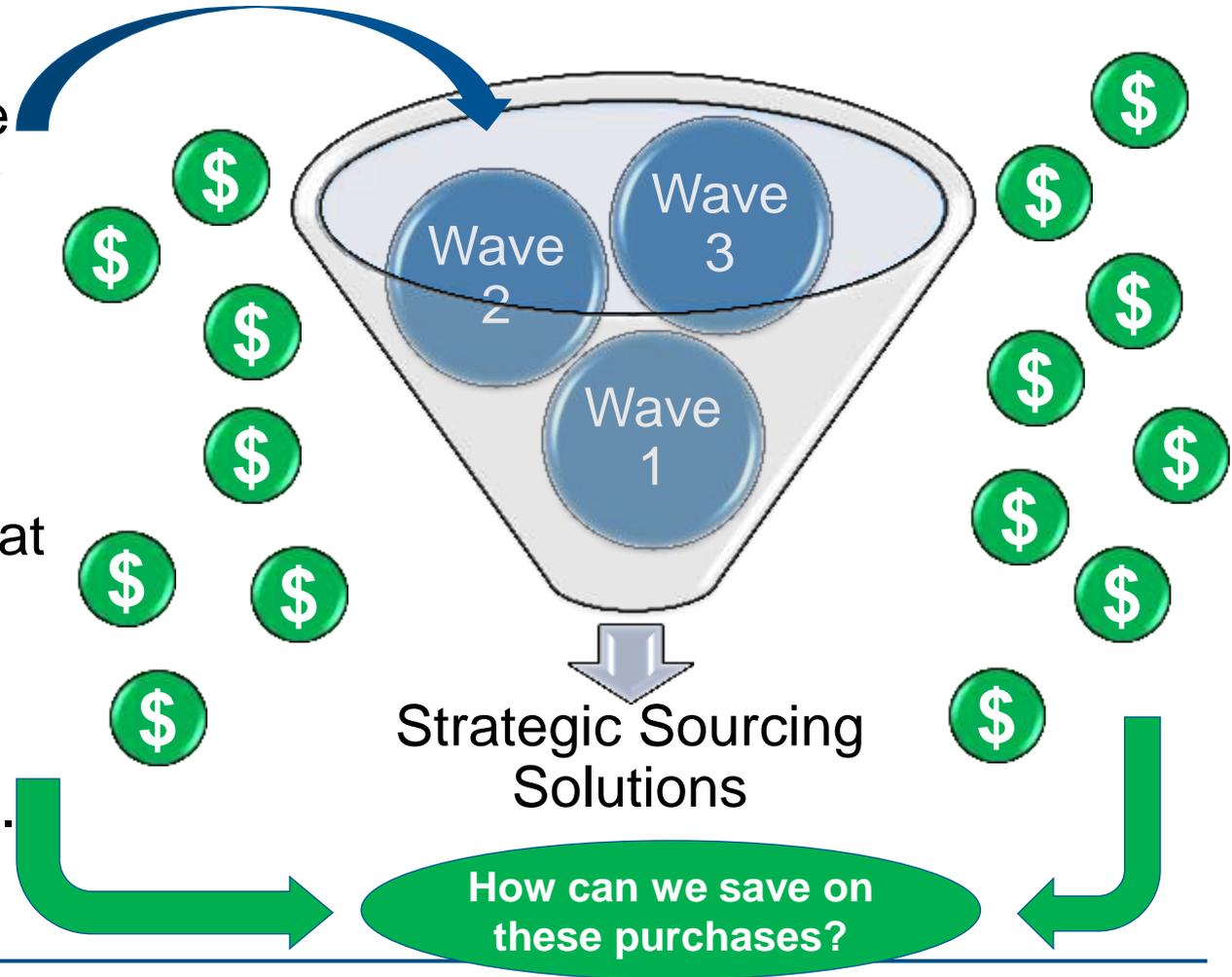


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# From the Assessment, a Need was Found

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

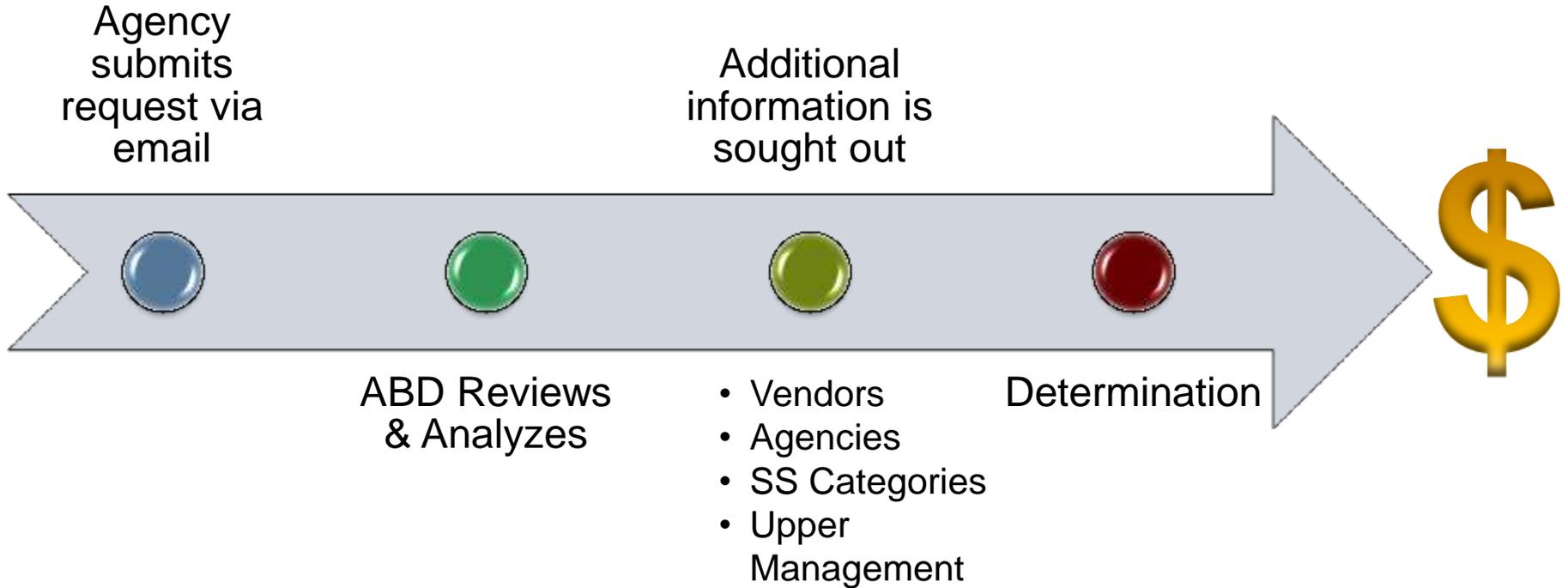
- Waves were established to create savings solutions for high dollar volume contracts.
- Purchases not currently in scope
- Urgent purchases that cannot await the sourcing solution
- Unique high-value individual purchases.



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# How to? The Process at the Buy Desk

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# When to Contact 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 are exceptions:

- travel,
- issue of grants,
- capital projects,
- membership dues,
- conferences fees,
- preferred source purchases, and
- purchases utilizing completed sourcing categories / contracts



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## How to work with the Buy Desk

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### ***When Agencies complete the ABD request form (template):***

- In notes section, provide pertinent information such as:
  - Term of contract,
  - Cost containment or price adjustment (CPI / flat), and
  - Current intention: plan to quote among resellers etc.
- **Submit 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



## What to Expect from the Buy Desk

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➤ Initial response should be within 2-4 days. Responses include:

- Proceed with purchase
- Hold for centralized contract availability
- Continue to work with the Buy Desk
- Request for more information



➤ Buy activities and timelines will vary. The Buy Desk will communicate our expected timeline, other involved parties for negotiation, and expectations for/needs from agency.



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## What does the Buy Desk do to **SAVE**?

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As the Central Buying organization, we can create savings by:

- Aggregating volume across agencies;
- Adjusting the timing of purchases;
- Collaborate purchasing with other agencies;
- Acting on behalf of the agencies; compete purchases with vendors and resellers on behalf of agencies.
- Assist with clause/ language used in contract or P.O. to create savings
- Verify or re-negotiate the CPI Calculation in existing contracts or purchases; e.g., current CPI could be dated or based on the wrong metric



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

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***The Assisted Buy Desk has saved agencies \$5.9M  
(as of 3/31/2013).***

This is without full agency participation. With full participation, this number would multiply!

### EXAMPLE: 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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# TEMPLATE DISCUSSION



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## What does a good submission look like?

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- Request date is the date the email/template is submitted to the Buy Desk
- Complete and appropriate answers in cells, e.g., numbers dollar amount fields, dates in date fields (No ASAP, N/A)
- Completely filled out (no blanks unless it is not applicable)
- Important information 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.



## Updated Submission Form

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- Designed based on user feedback
- Template is 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 saving valuable viewing 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 and grouped together



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## Lessons Learned

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### TIMING IS KEY:

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



### CONFIRM 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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# Questions

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# APPENDICES



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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.

