NY GovBuy

Project Based Information Technology Consulting Services (PBITS) Contracts

Case Studies in How to Procure IT Project Based Services

May 2 & 3, 2018

#2018NYGovBuy @NYSPro @nysprocurement
Agenda

• How to use this contract
• Where to find helpful resources
• Review Case Studies
• Who to contact for questions

Speakers

• Mark Joly
• Jessica Paul
• Sonni D’Andrea
• Nancy Dougherty
• Shannon Prica-Kast
• PBITS Users from DOT, OMH, and OGS
  – David Mackey
  – Paul Murray
  – Susan “Sue” Bixby
Restricted Period Currently In Effect

Designated Contact

- Information Technology Umbrella Contract-Manufacturer Based - First Periodic Recruitment
  PS_SW_ITF@ogs.ny.gov
- Hourly Based Information Technology Services

What is a restricted period?

This is the time between when a solicitation is released and the contract is awarded. During this time, make sure to direct your questions to the designated contacts.

OGS Restricted Periods List

https://nyspro.ogs.ny.gov/content/restricted-periods-list
IT Centralized Contract Suite Overview

#2018NYGovBuy @NYSPro @nysprocurement
IT Contracts
Components of the OGS information technology contracting suite:

- HBITS – Hourly Based IT Services (2012, 2018)
- PBITS – Project Based IT Consulting Services (2015, 2016)
  - Aggregate Buys
- IT Umbrella Contract - Distributor Based (2016)

Easy to Use
- Standardized forms to make the mini-bid and request for quote (RFQ) process easier.
- The same terms and conditions for all vendors in each contract.
When to use HBITS and PBITS

HBITS:
• Hourly Based
• Staff Augmentation
• 2 to 24 months

PBITS:
• Project Based
• Deliverables
• Up to 36 months
Hourly Based IT Services Overview

#2018NYGovBuy  Twitter: @NYSPro  Facebook: @nysprocurement
HBITS

• Assists Authorized Users in receiving IT services quickly

• Stimulates competition to lower costs

• Increased MWBE participation
HBITS Update

• Current contract expires 10/31/18

• Solicitation to replace the current contract is in process and we do not expect any lapse in services

• Restricted Period is currently in effect
Project Based IT Consulting Services

Overview
PBITS Key Contract Components

- For consulting services related to a project only
- Maximum not-to-exceed pricing
- Each project has a maximum duration of **36 months**
- Standardized contractor requirements, terms, and conditions
- The contract includes optional periodic recruitments, allowing OGS to add more contractors, increasing competition and offering a greater variety of expertise
PBITS Contract Structure

The contract is divided into lots based on anticipated project cost

- Lot 1: <$200K
- Lot 2: $200K - $7.5M
- Lot 3: $7.5 - $25M

OGS Centralized Contract
What Can You Use This Contract For?

• This contract can be used to obtain consulting services for a project with payments made for deliverables, not on an hourly basis.

• Projects range from the development of proprietary software solutions and customized training to project management.

• Authorized Users have three lots, or categories to choose from based on anticipated project value.
What Can You Use This Contract For?

In Scope Projects

- Technical architecture advisory services
- Independent Verification & Validation (IV & V) Services
- Proprietary software application development/customization, programming and integration
- Data categorization
- Data information management (migration, conversion, manipulation, integration)
- Project management support services
- Implementation of open-source software
What Can You Use This Contract For?

Out of Scope Projects

- Staff augmentation or data entry services
- Hardware and software maintenance and support
- Prepackaged training courses
- Buying equipment or off-the-shelf software

- Services such as network provisioning, voice services, or video bridging
- Cloud based or “as a service” offerings, including, but not limited to SaaS, IaaS, PaaS, and XaaS
- eLearning
PBITS: Suggested Process Overview

1. Receive approvals
2. Develop project documents
3. Release the mini-bid by notifying contractors & collect responses
4. Evaluate responses & make final determination
5. Finalize mini-bid award with the contractor
6. Notify all contractors who responded
Resources on the OGS Website

#2018NYGovBuy  @NYSPro  @nysprocurement
The PBITS Landing Page

http://www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM
Available Templates

TITLE: 73600 - PROJECT BASED INFORMATION TECHNOLOGY CONSULTING SERVICES (PBITS) (STATEWIDE)

AWARD: 22772

HOW TO USE THIS CONTRACT

Mini-Bid Participation Interest

Mini-Bid Template

Mini-Bid Financial Response Template

No Cost Change Request Template

Enhancement Request Template

SAMPLE SCOPES

Cyber Security Risk Assessment Sample Scope
The PBITS Landing Page

http://www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM

<table>
<thead>
<tr>
<th>Project Based Information Technology Consulting Services (PBITS)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Award Document</strong></td>
</tr>
<tr>
<td>(Updated / Revised)</td>
</tr>
<tr>
<td><strong>Contract Updates</strong></td>
</tr>
<tr>
<td><strong>Contractor Information</strong></td>
</tr>
<tr>
<td><strong>Template Page</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Mailing List By Lot</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Contractor Template Page</strong></td>
</tr>
<tr>
<td><strong>How To Use</strong></td>
</tr>
<tr>
<td><strong>Historical Information</strong></td>
</tr>
<tr>
<td><strong>Customer Service</strong></td>
</tr>
</tbody>
</table>

**Description:**
The Project Based Information Technology (IT) Consulting Services Contracts streamline the procurement of IT Consulting Services for Authorized Users of NYS OGS Centralized Contracts. Services required by an Authorized User can be obtained via an expedited competitive Mini-Bid process. Authorized User Agreements awarded as a result of Mini-Bids under this Centralized Contract will result in fixed-price deliverable-based agreements for Consulting Services.

Authorized Users Contact: PBITS.AuthorizedUsers@ogs.ny.gov
Contractors Contact: PBITS.Contractors@ogs.ny.gov
Case Studies from PBITS Mini-Bid Users

#2018NYGovBuy  @NYSPro  @nysprocurement
PBITS Mini-Bid Users

NYSDOT
Purchasing Unit
• David Mackey – Contract Management Specialist

NYSOMH
Consolidated Business Office
• Paul Murray - Contract Management Specialist 3

NYSOGS
eProcurement Team
• Sue Bixby - Business Systems Analyst
Remember: We’re Here to Help

PBITS Contact

PBITS.AuthorizedUsers@ogs.ny.gov

Helpful Resources - PBITS

• Contract page:
  – [www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM](http://www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM)

• How to use guide:
Remember: We’re Here to Help (continued)

HBITS Contact

HBITS.StateAgencies@ogs.ny.gov
HBITS.NonExecutiveAgencies@ogs.ny.gov

Helpful Resources - HBITS

• Contract page:
  – www.ogs.ny.gov/purchase/snt/awardnotes/7301222439can.HTM

• How to use guides:
  – www.ogs.ny.gov/BU/PC/hbits/docs/1_HowtoUseHBITS.pdf
  – www.ogs.ny.gov/BU/PC/hbits/docs/Form5HowToGuide.pdf
Remember: We’re Here to Help (continued)

IT Services Suite Contacts

• IT Umbrella Contract - Manufacturer Based: MfrUmbrella.AuthorizedUsers@ogs.ny.gov

• IT Umbrella Contract - Distributor Based: PSDistUmbrella.AuthorizedUsers@ogs.ny.gov
Remember: We’re Here to Help (continued)

IT Services Suite Contacts

• IT Umbrella Contract - Manufacturer Based: MfrUmbrella.AuthorizedUsers@ogs.ny.gov

• IT Umbrella Contract - Distributor Based: PSDistUmbrella.AuthorizedUsers@ogs.ny.gov
Questions

#2018NYGovBuy @NYSPro @nysprocurement
Who We Are & What We Offer

#2018NYGovBuy  @NYSPro  @nysprocurement
Overview of OGS Procurement Services

We are the state’s central procurement office responsible for establishing and managing Centralized contracts for goods and services needed by government entities across New York.
Who Can Use Our Contracts?

Who’s Eligible

• State agencies
• Local governments
• Public and private schools and universities
• Charitable non-profit organizations
• Public authorities
• Public benefit corporations

How to Get Started

• To use our contracts you must complete an eligibility application to receive an authorized user number.

Where to find the eligibility application:
www.nyspro.ogs.ny.gov/content/using ogs-centralized-contracts-0
PBITS: Suggested Process

1. Receive Approvals

2. Develop Project Documents
   - Scope of Work
   - Deliverables
   - Timeline
   - Evaluation Criteria & Method of Award

3. Release the mini-bid by notifying contractors & collect responses

4. Evaluate responses & make final determination

5. Finalize mini-bid award with the contractor

6. Notify all contractors who responded
### The PBITS Landing Page

http://www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM

<table>
<thead>
<tr>
<th>Project Based Information Technology Consulting Services (PBITS)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Award Document</strong> (Updated: Revised)</td>
</tr>
<tr>
<td><strong>Contract Period:</strong> September 09, 2015 - September 06, 2015</td>
</tr>
<tr>
<td><strong>Contract Updates</strong></td>
</tr>
<tr>
<td><strong>Group:</strong> 736000 <strong>Award:</strong> 22772</td>
</tr>
<tr>
<td><strong>Contractor Information</strong></td>
</tr>
<tr>
<td><strong>Use of Contracts:</strong> All State Agencies and Non-State Agencies</td>
</tr>
<tr>
<td><strong>Template Page</strong></td>
</tr>
<tr>
<td><strong>Contact Person:</strong> Nancy Dougherty <strong>Telephone:</strong> (518) 408-5205</td>
</tr>
<tr>
<td><strong>Mailing List By Lot</strong></td>
</tr>
<tr>
<td><strong>Contract issued:</strong> September 17, 2015 <strong>Contract Updated:</strong> March 22, 2017</td>
</tr>
<tr>
<td><strong>Contractor Template Page</strong></td>
</tr>
<tr>
<td><strong>How To Use</strong></td>
</tr>
<tr>
<td><strong>Historical Information</strong></td>
</tr>
<tr>
<td><strong>Customer Service</strong></td>
</tr>
</tbody>
</table>

**Description:**

The Project Based Information Technology (IT) Consulting Services Contracts streamline the procurement of IT Consulting Services for Authorized Users of NYS OGS Centralized Contracts. Services required by an Authorized User can be obtained via an expedited competitive Mini-Bid process. Authorized User Agreements awarded as a result of Mini-Bids under this Centralized Contract will result in fixed-price deliverable-based agreements for Consulting Services.

**Authorized Users Contact:** PBITS.AuthorizedUsers@ogs.ny.gov
**Contractors Contact:** PBITS.Contractors@ogs.ny.gov

Install Free Adobe Acrobat Reader for PDF Documents
Contractor Information

CONTRACTOR’S PRICING INFORMATION

TITLE: 73600 - PROJECT BASED INFORMATION TECHNOLOGY CONSULTING SERVICES (PBI/TS)
(STATEWIDE)

AWARD: 22772  CONTRACT PERIOD: Contract Approval & End Dates (Various - see below)

<table>
<thead>
<tr>
<th>LOT 1</th>
<th>LOT 2</th>
<th>LOT 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>PB090AA MBE</td>
<td>GCOM Software, Inc. 24 Madison Avenue Extension Albany, NY 12203 518-869-1671 Ext 230</td>
<td>FED ID# 202902922 NYS Vendor ID# 1000016650</td>
</tr>
</tbody>
</table>

CONTACT PERIOD: March 04, 2016 – September 8, 2018

INSURANCE MATRIX

Contact Information
Price List
Terms & Conditions
Contractor Insurance Information

<table>
<thead>
<tr>
<th>Contractor Name</th>
<th>Lot 1</th>
<th>Lot 2</th>
<th>Lot 3</th>
<th>Technology Errors and Omissions</th>
<th>Crime</th>
</tr>
</thead>
<tbody>
<tr>
<td>3DI, Inc.</td>
<td>X</td>
<td></td>
<td>Accepted</td>
<td>Time of First Transaction</td>
<td>Time of First Transaction</td>
</tr>
<tr>
<td>Abator Information Services, Inc.</td>
<td></td>
<td>X</td>
<td>Accepted</td>
<td>Time of First Transaction</td>
<td>Accepted</td>
</tr>
<tr>
<td>Advizex Technologies, LLC</td>
<td></td>
<td>X</td>
<td>Time of First Transaction</td>
<td>Accepted</td>
<td></td>
</tr>
<tr>
<td>Aeon Nexus Corporation</td>
<td></td>
<td>X</td>
<td>Accepted</td>
<td>Time of First Transaction</td>
<td></td>
</tr>
<tr>
<td>Applied Geographics, Inc.</td>
<td></td>
<td>X</td>
<td>Accepted</td>
<td>Time of First Transaction</td>
<td></td>
</tr>
<tr>
<td>Ardent Technologies, Inc.</td>
<td>X</td>
<td></td>
<td>Time of First Transaction</td>
<td>Accepted</td>
<td></td>
</tr>
<tr>
<td>ATRIA Consulting, LLC</td>
<td>X</td>
<td></td>
<td>Accepted</td>
<td>Time of First Transaction</td>
<td></td>
</tr>
<tr>
<td>Bowne Management Systems, Inc.</td>
<td></td>
<td>X</td>
<td>Time of First Transaction</td>
<td>Time of First Transaction</td>
<td></td>
</tr>
<tr>
<td>Business Information Technology Solutions Inc.</td>
<td></td>
<td>X</td>
<td>Time of First Transaction</td>
<td>Time of First Transaction</td>
<td></td>
</tr>
<tr>
<td>VMware, Inc.</td>
<td>X</td>
<td></td>
<td>Time of First Transaction</td>
<td>Time of First Transaction</td>
<td></td>
</tr>
<tr>
<td>Windsor Solutions, Inc.</td>
<td>X</td>
<td></td>
<td>Time of First Transaction</td>
<td>Time of First Transaction</td>
<td></td>
</tr>
<tr>
<td>Zambri &amp; Associates LLC</td>
<td></td>
<td>X</td>
<td>Time of First Transaction</td>
<td>Time of First Transaction</td>
<td></td>
</tr>
</tbody>
</table>

OGS has made a change to the Insurance Matrix. Going forward, the Matrix will only list Contractors that have yet to submit accepted proof of Technology Errors & Omissions and/or Crime Insurance coverage that meets all contract requirements. Lot 1 and 2 Contractors were not required to meet these two insurance requirements until the time of their first transaction.

If an Authorized User does not see a Contractor's name on the Insurance Matrix, it is because of the above mentioned change. That is to say, any Contractor that does not appear in the Matrix has met all insurance-related contract requirements at this time.

Authorized Users may send any inquiries concerning the insurance status of all Contractors to ogs.sm.PBITS.AuthorizedUsers@ogs.ny.gov.
# Mini-Bid Template

**Insert Authorized User Name**
**Insert Authorized User Street Address**
**Insert Authorized User City, State, Zip Code**

## Mini-Bid # Insert Mini-Bid Reference Number
**Insert Project Name**

**Contract Category:** PROJECT BASED INFORMATION TECHNOLOGY CONSULTING SERVICES  
**Group:** 73600 AWARD NUMBER: 23772  
**Fixed-Price Basis Only**

**Insert Lot No.**

## Designated Contacts

<table>
<thead>
<tr>
<th>Primary Contact</th>
<th>Insert First and Last Name</th>
<th>E-mail address: Insert E-Mail Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary Contact</td>
<td>Insert First and Last Name</td>
<td>E-mail address: Insert E-Mail Address</td>
</tr>
</tbody>
</table>

Authorized User shall indicate if Procurement Lobbying Law/Restricted Period is in effect:  
- Yes  
- No

Where Procurement Lobbying Law is deemed applicable by the Authorized User, by signing, Contractor affirms that it understands and agrees to comply with the Authorized User’s policies and procedures relative to permissible contacts. Information may be accessed at Procurement Lobbying  
http://www.ogc.ny.gov/about/pros/lobbying/defaultAdvisoryCouncil.html

---

**1. PROJECT OVERVIEW**

(Provide a brief overview of the project. Much of this information may be extracted from existing documents such as Project Charter, Business Case, etc. Fields may be modified or updated as required.)

### 1.1 PROJECT BACKGROUND

(Please provide Contractors with a short summary of the project’s history and proposed approach, such as:
- Short statement of the business need and problem to be resolved
- Time line or review of major dates in the project development process
- Authorized User organizational units and key personnel involved in advancing the project
- Alternative solutions or implementation strategies evaluated)

### 1.2 PROJECT PURPOSE / OBJECTIVES

(Identify the key end results that the project will achieve when successfully executed. Measurable performance indicators for anticipated benefits may also be listed here.)

### 1.3 BUSINESS PROCESSES IMPACTED

(Review major changes in the way business will be conducted once the project is complete (if any).)
## Mailing Lists By Lot - Designated Email Addresses

<table>
<thead>
<tr>
<th>LOT 3 Contractor</th>
<th>Designated Email</th>
<th>MBE/WBE/ SB</th>
</tr>
</thead>
<tbody>
<tr>
<td>22nd Century Technologies, Inc.</td>
<td><a href="mailto:govt@tscti.com">govt@tscti.com</a></td>
<td>MBE</td>
</tr>
<tr>
<td>Accenture LLP</td>
<td><a href="mailto:preetham.morkonda@accenture.com">preetham.morkonda@accenture.com</a></td>
<td></td>
</tr>
<tr>
<td>CGI Technologies and Solutions, Inc.</td>
<td><a href="mailto:daniel.santandrea@cgi.com">daniel.santandrea@cgi.com</a></td>
<td></td>
</tr>
<tr>
<td>CherryRoad Technologies Inc.</td>
<td><a href="mailto:kmulholland@cherryroad.com">kmulholland@cherryroad.com</a></td>
<td></td>
</tr>
<tr>
<td>CRGT Inc.</td>
<td><a href="mailto:hzach@crgt.com">hzach@crgt.com</a></td>
<td></td>
</tr>
<tr>
<td>Currier, McCabe &amp; Assoc. (CMA)</td>
<td><a href="mailto:proposals@cma.com">proposals@cma.com</a></td>
<td>WBE</td>
</tr>
<tr>
<td>Deloitte Consulting LLP</td>
<td><a href="mailto:aquinonescardona@deloitte.com">aquinonescardona@deloitte.com</a></td>
<td></td>
</tr>
<tr>
<td>First Data Government Solutions, LLP</td>
<td><a href="mailto:david.sodergren@firstdata.com">david.sodergren@firstdata.com</a></td>
<td></td>
</tr>
<tr>
<td>Gartner Inc.</td>
<td><a href="mailto:meg.collins@gartner.com">meg.collins@gartner.com</a></td>
<td></td>
</tr>
<tr>
<td>GCOM Software, Inc.</td>
<td><a href="mailto:julie@gcomsoft.com">julie@gcomsoft.com</a></td>
<td>MBE</td>
</tr>
<tr>
<td>HP Enterprise Services, LLC</td>
<td><a href="mailto:Val.koricki@hp.com">Val.koricki@hp.com</a></td>
<td></td>
</tr>
<tr>
<td>KPMG LLP</td>
<td><a href="mailto:gplante@kpmg.com">gplante@kpmg.com</a></td>
<td></td>
</tr>
<tr>
<td>Metaformers, Inc.</td>
<td><a href="mailto:contracts@metaformers.com">contracts@metaformers.com</a></td>
<td></td>
</tr>
<tr>
<td>New York State Technology Enterprise Corp (NYSTATEC)</td>
<td><a href="mailto:OGS-ITConsulting@nystec.com">OGS-ITConsulting@nystec.com</a></td>
<td></td>
</tr>
<tr>
<td>NTT Data, Inc. D/B/A Subsidiary of NTT Data International Services, Inc., Boston, MA</td>
<td><a href="mailto:anthony.grego@nttdata.com">anthony.grego@nttdata.com</a></td>
<td>MBE/WBE</td>
</tr>
<tr>
<td>Office of General Services</td>
<td><a href="mailto:pbits.authorizedusers@ogs.ny.gov">pbits.authorizedusers@ogs.ny.gov</a></td>
<td></td>
</tr>
<tr>
<td>PruTech Solutions, Inc.</td>
<td><a href="mailto:PBITS@Prutech.com">PBITS@Prutech.com</a></td>
<td>MBE/WBE</td>
</tr>
<tr>
<td>Systems Made Simple, LLC</td>
<td><a href="mailto:christine.fowler@systemsmadesimple.com">christine.fowler@systemsmadesimple.com</a></td>
<td></td>
</tr>
<tr>
<td>Tata America International Corp.</td>
<td><a href="mailto:gene.taranto@tcs.com">gene.taranto@tcs.com</a></td>
<td></td>
</tr>
<tr>
<td>Unysis Corporation</td>
<td><a href="mailto:ron.sautter@unisys.com">ron.sautter@unisys.com</a></td>
<td></td>
</tr>
</tbody>
</table>