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**Office of
General Services**

PBITS, HBITS, and Umbrella Contracts

The Contract Trifecta for Optimizing Your IT Service Procurements



May 4 & 5, 2022

Your Presenters

Steven Charles

Sean McManus

Agenda

- Procurement portfolio overview
- The IT contract trifecta
 - How to get R.E.A.L.
- Overview of each contract in the trifecta
 - Benefits/considerations for success
- How to use the trifecta to optimize IT projects

Restricted Periods Currently In Effect

- Information Technology
Umbrella Contract:
Manufacturer Base (Statewide)
Periodic Recruitment

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

<https://ogs.ny.gov/procurement/restricted-period-lists>



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Procurement Portfolio Overview

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 @NewYorkStateOGS

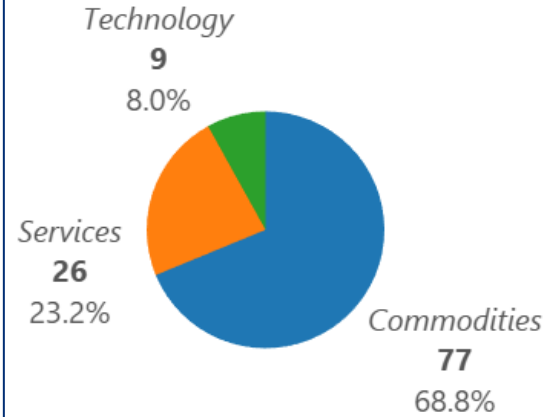
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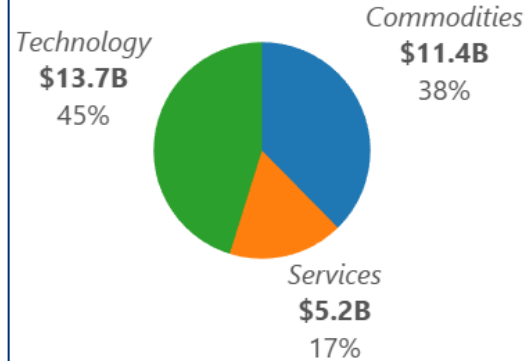
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IT within Procurement

Awards



Portfolio Value



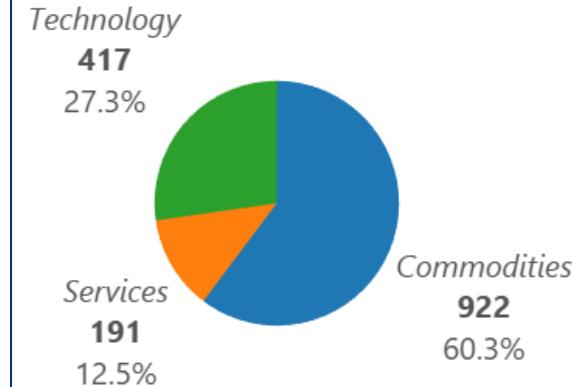
Portfolio Overview

Awards: 112

Value: \$30.4B

Contracts: 1,530

Contracts



Over 8,000 active customers spend ~\$5.2B annually



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We've Got You Covered

The contracts are designed to:



Offer a wide variety of products and services

- Whatever you need in IT – we have it here for YOU!



Save you time

- Solicitations, contract negotiations, and contract administration done for you



Save you money

- Maximum pricing and minimum discounts established for you

We've Got You Covered

The contracts are designed to:

-  **Ensure safer procurements**
 - Terms are created and negotiated with your best interest in mind
-  **Level the playing field**
 - Terms and conditions for all contractors in each contract group are the same
-  **Provide process efficiencies**
 - Uniform templates and forms to make the request for quote (RFQ) process easy for YOU!

IT Contract Trifecta

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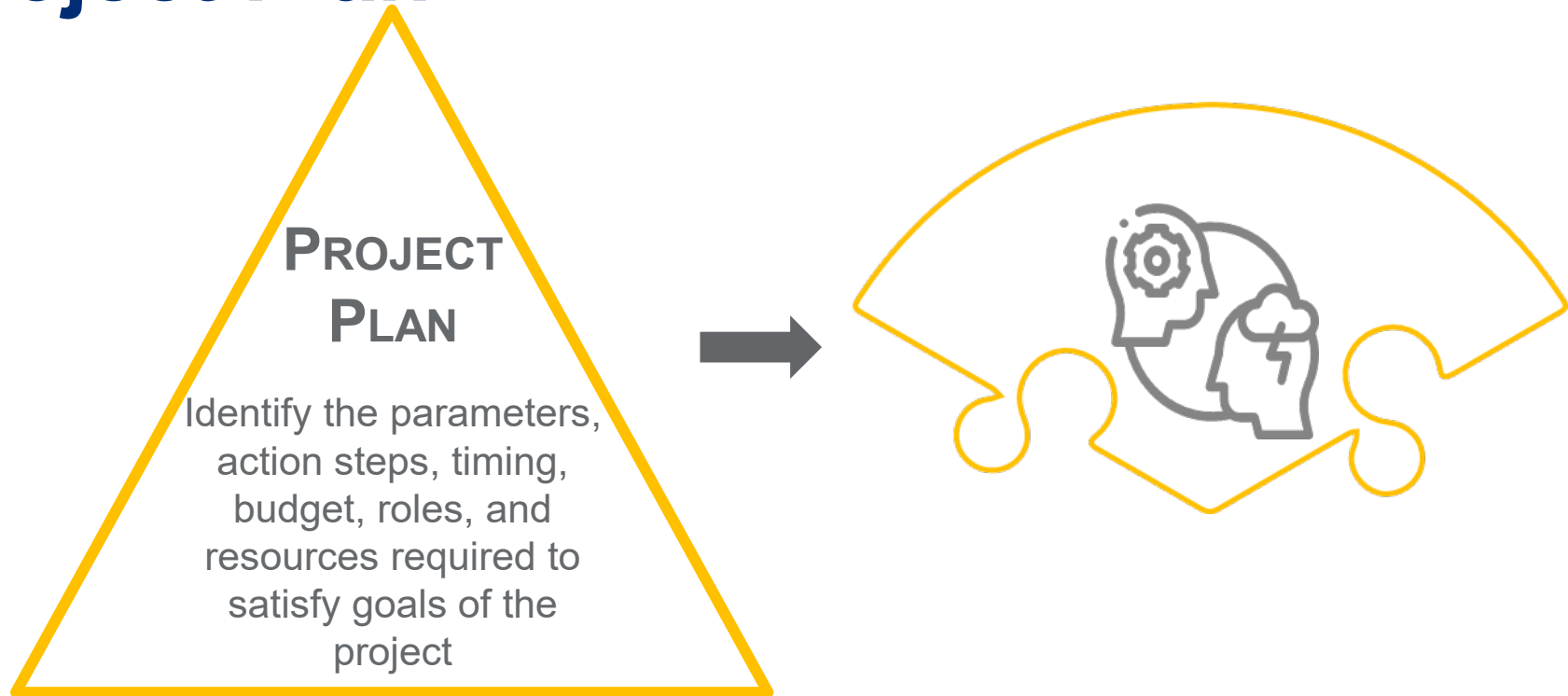


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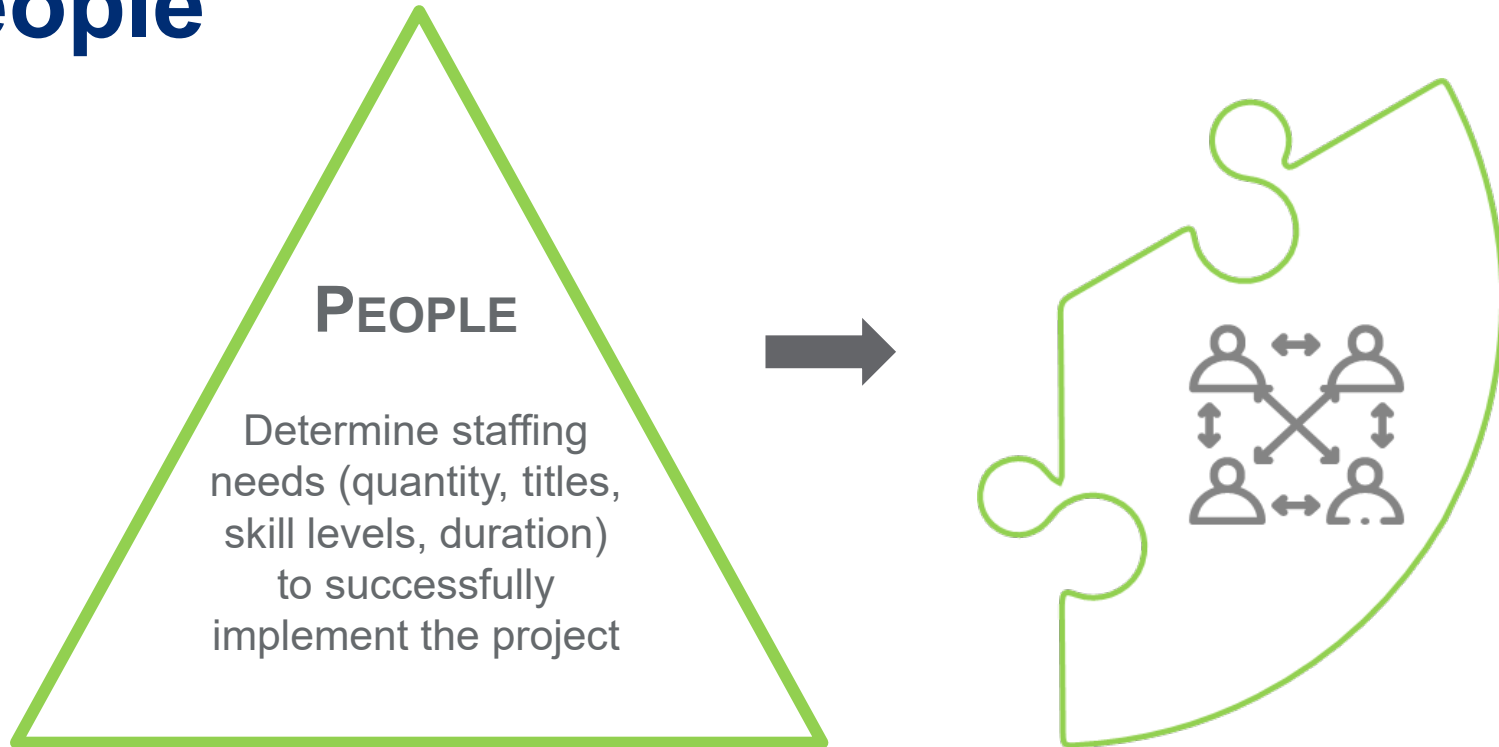
IT Trifecta: Putting the Pieces Together

- What comes to your mind when you think of an IT project?
- Can you identify the core elements of any IT project?

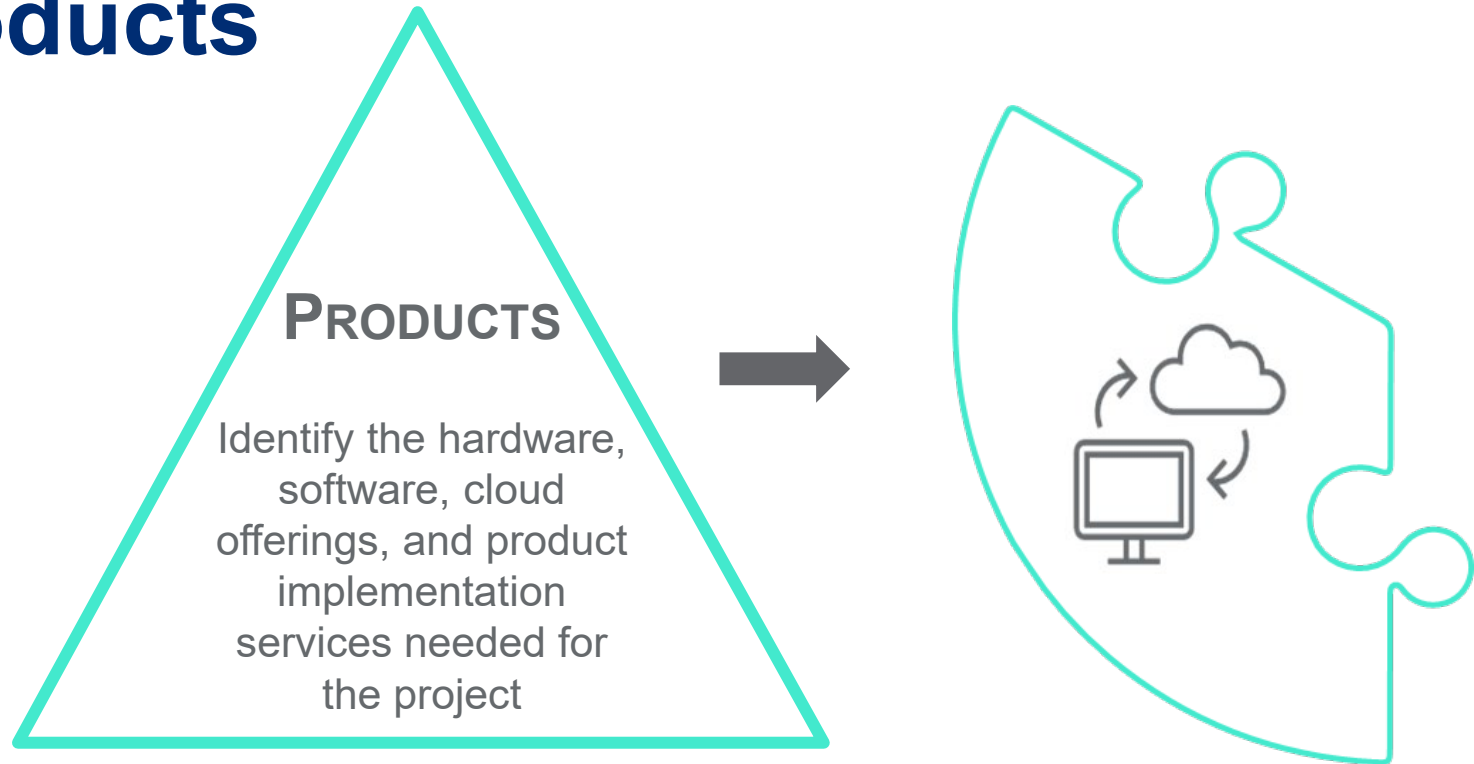
Core Elements of an IT Project – the Project Plan



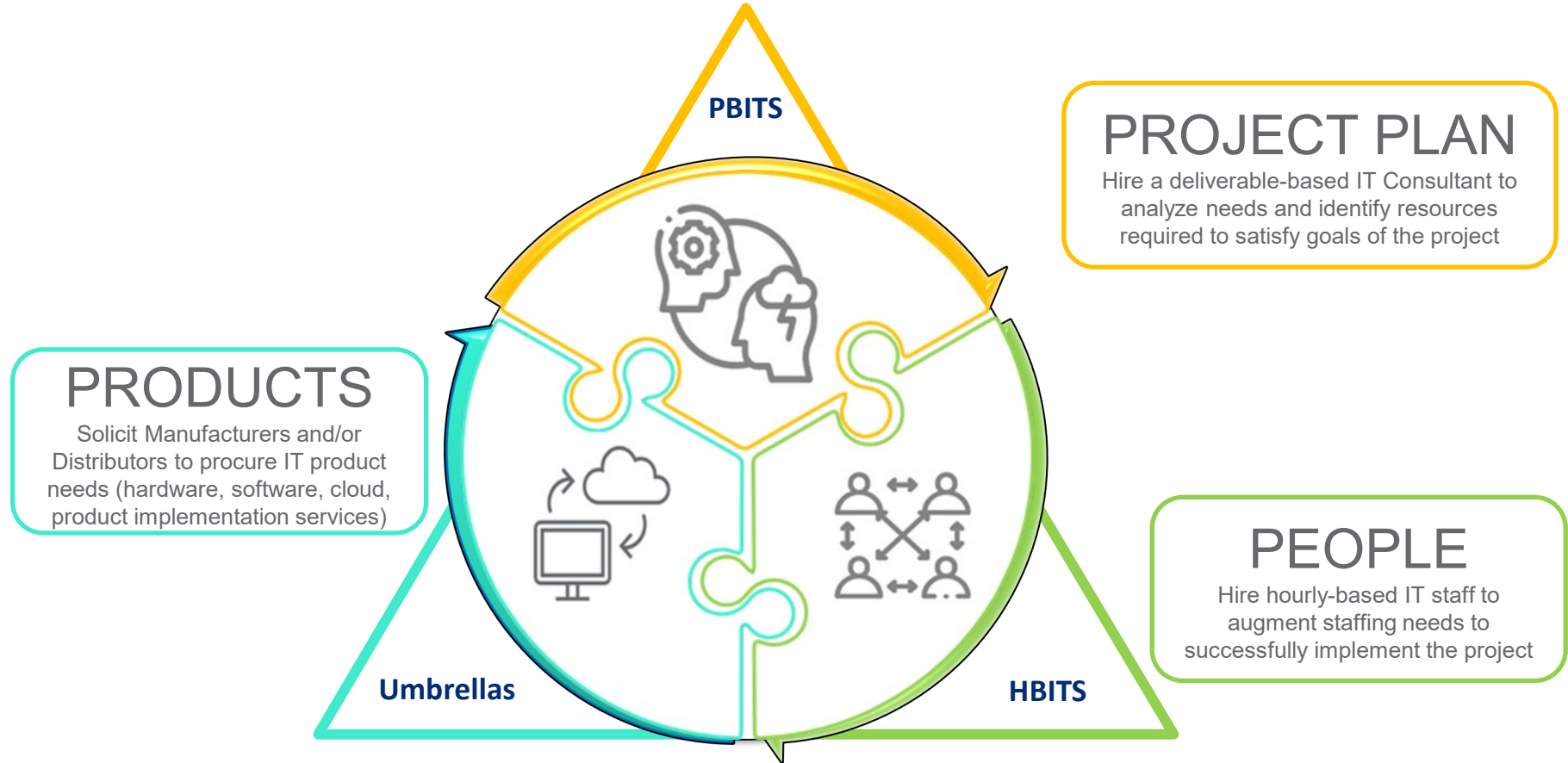
Core Elements of an IT Project – People



Core Elements of an IT Project – Products



IT Contract Trifecta



How Do I Know How to Put the Pieces Together?

Develop your scope, then get R.E.A.L.

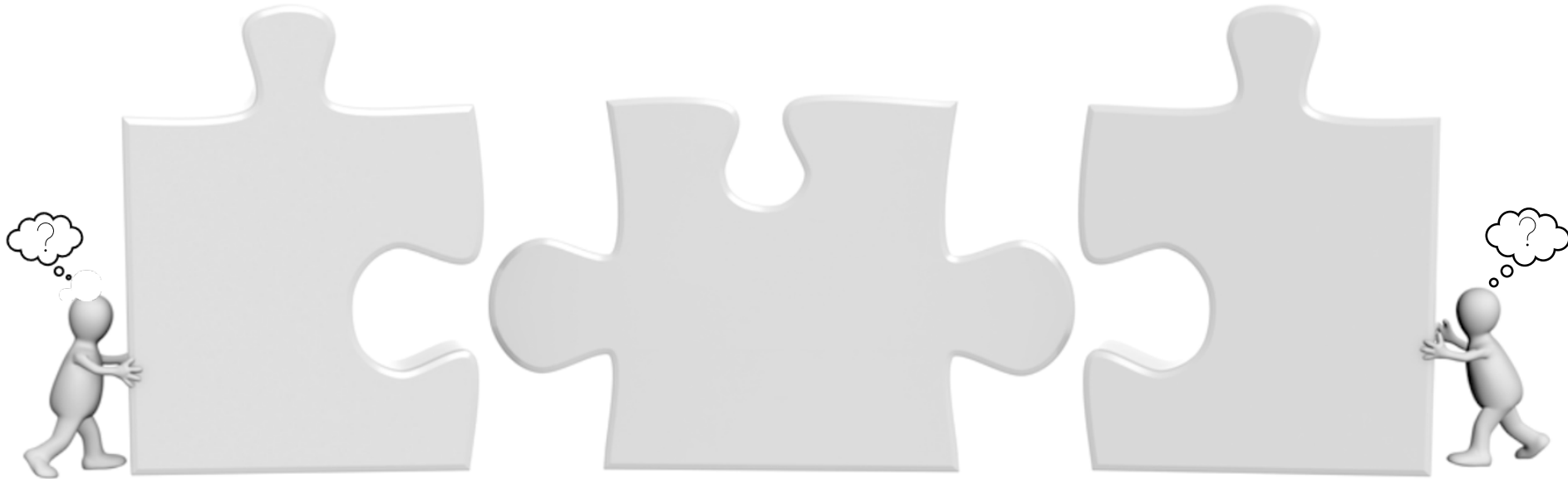
R – **REVIEW** your scope

E – Qualitatively **EVALUATE** yourself using the same criteria

A – Objectively **ASSESS** your in-house capabilities in each area

L – **LEVERAGE** in-house strengths/**LEAN** on OGS contracts for the rest

Every Project Starts with Unidentified Pieces



Get R.E.A.L. and See the Picture Unfold



Hourly Based IT Services (HBITS)

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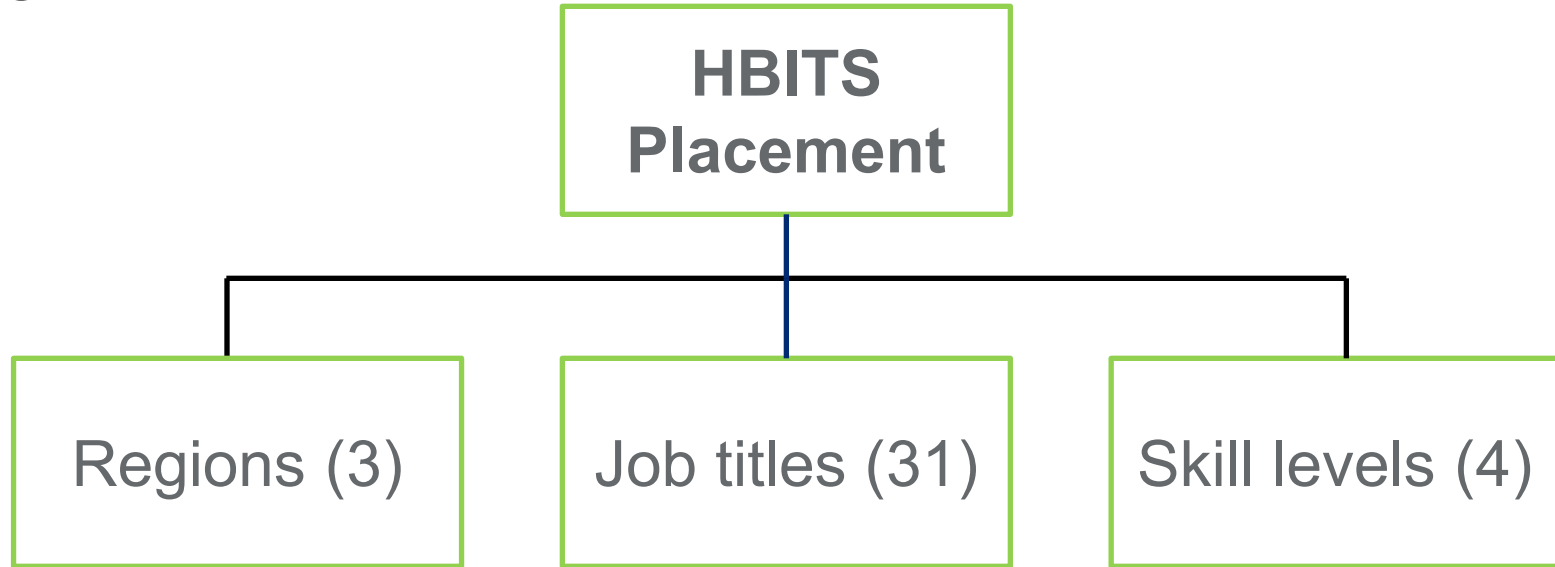
Hourly Based Information Technology Services (HBITS)

- This contract is used to secure quality IT consulting services on an hourly basis for staff augmentation for up to 30-month engagements
- Payments are based on fixed hourly pricing according to job titles, skill levels, and region

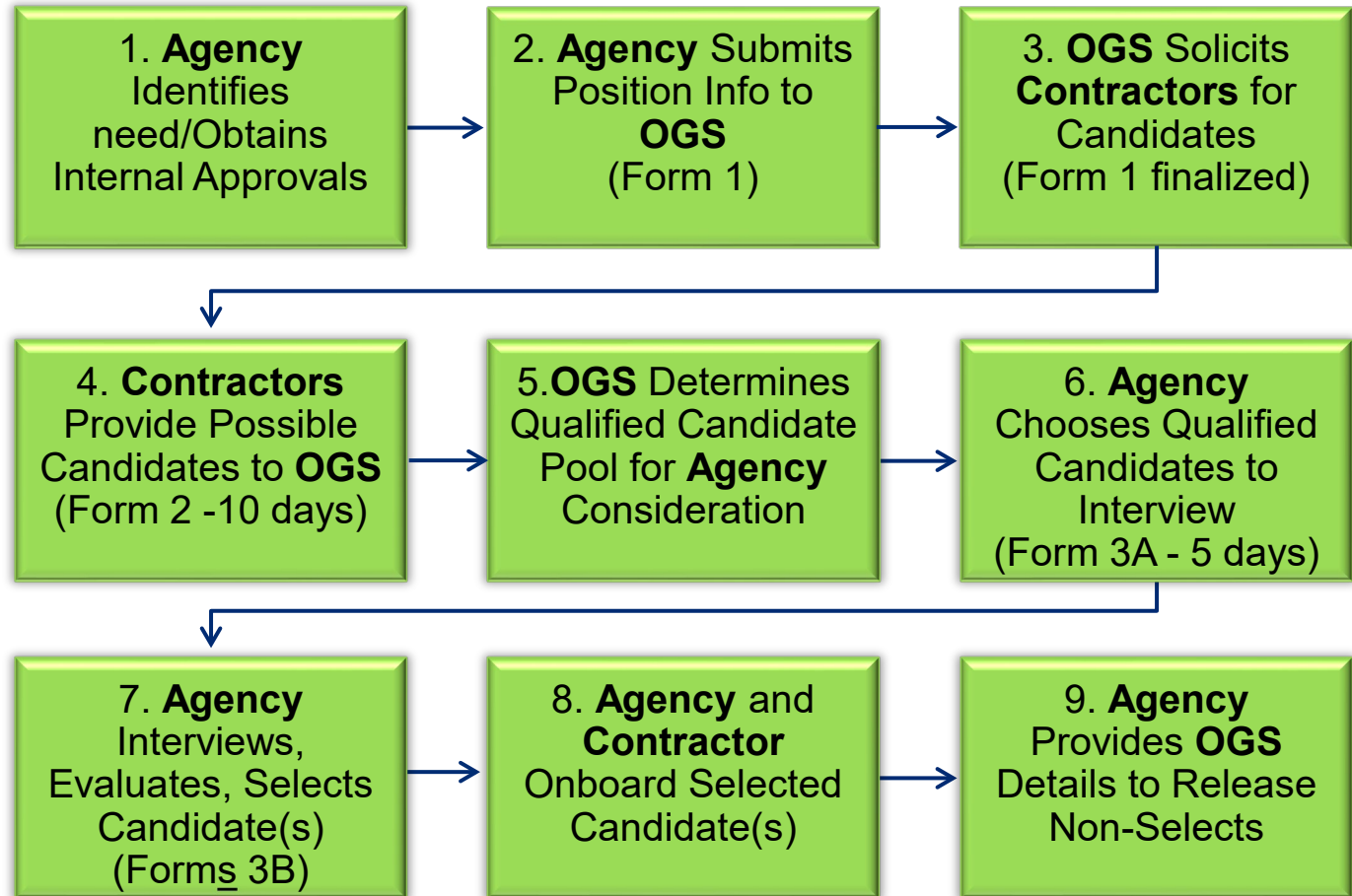


HBITS Contract Structure

- Qualified candidates are selected based on job title, skill level, and region



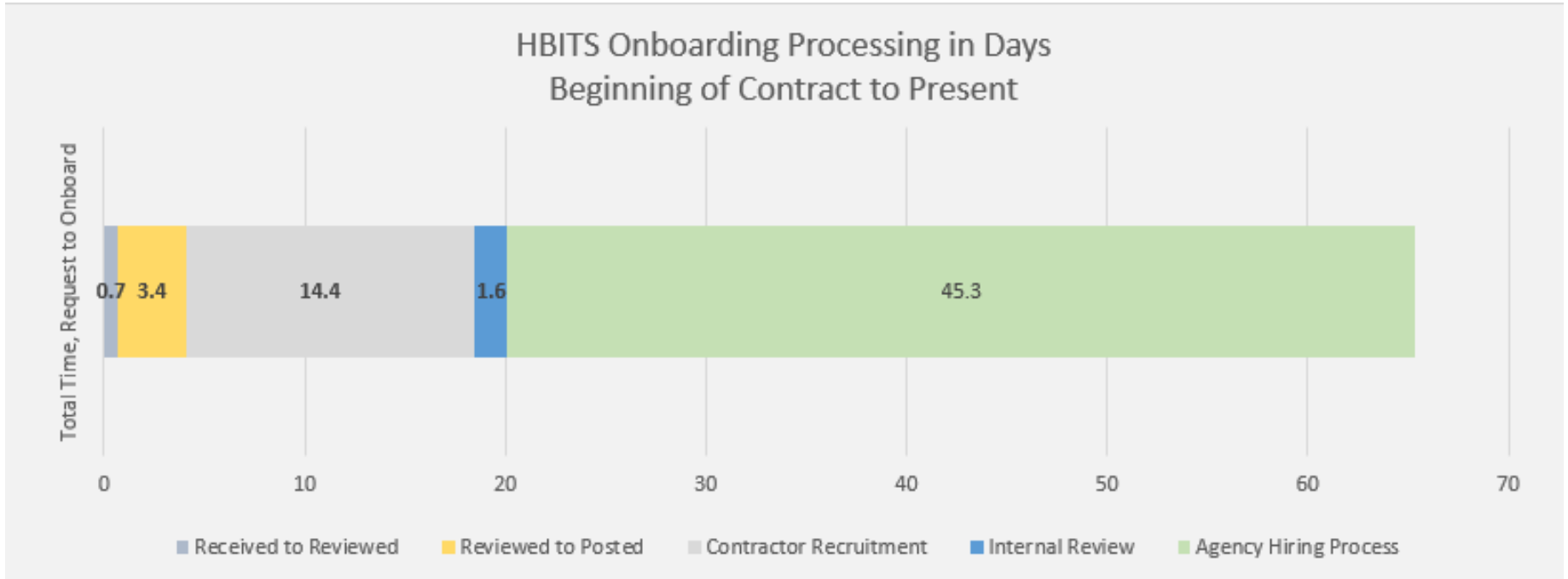
HBITS: Process Overview




HBITS Considerations for Success

- Read the How to Use & HBITS Process documents
- Use measurable qualifications
- Fill out the forms accurately - we can't alter your entries
- Onboarding TIP- don't waste time! Strategize/plan ahead
- Maximize knowledge transfer opportunities

HBITS Onboarding Process in Days



Available Resources for HBITS

**NEW YORK**
STATE OF
OPPORTUNITY.

**Office of General Services
Procurement Services**

Corning Tower, Empire State Plaza, Albany, NY 12242 | <https://ogs.ny.gov/procurement> | customer.services@ogs.ny.gov | 518-474-6717

Contract Specifics Summary

Updated: August 11, 2021

Group 73012 – HOURLY-BASED INFORMATION TECHNOLOGY SERVICES (HBITS) (STATEWIDE)		
Award Number:	23158	Contract Period <i>July 01, 2019 – June 30, 2024</i>

[TEMPLATE CONTRACT](#)

[APPENDIX A](#)

[APPENDIX B](#)

[INSURANCE REQUIREMENTS \(Attachment 3\)](#)

[JOB TITLES, SKILL LEVELS, REGIONS \(Attachment 4\)](#)

[HOW TO USE HBITS CONTRACT \(Attachment 5\)](#)

[HBITS CONTRACT FORMS \(Attachment 6\)](#)

[HBITS PROCESS \(Attachment 7\)](#)
Revised 08/11/2021

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HBITS in the Trifecta



Avoid Turning a Trifecta into a Try Again!



Project Based IT Services (PBITS)

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Project Based Information Technology Services (PBITS)

- This contract is used to obtain IT consulting services for individual IT projects
- Payments are made for accepted fixed priced deliverables, not on an hourly basis

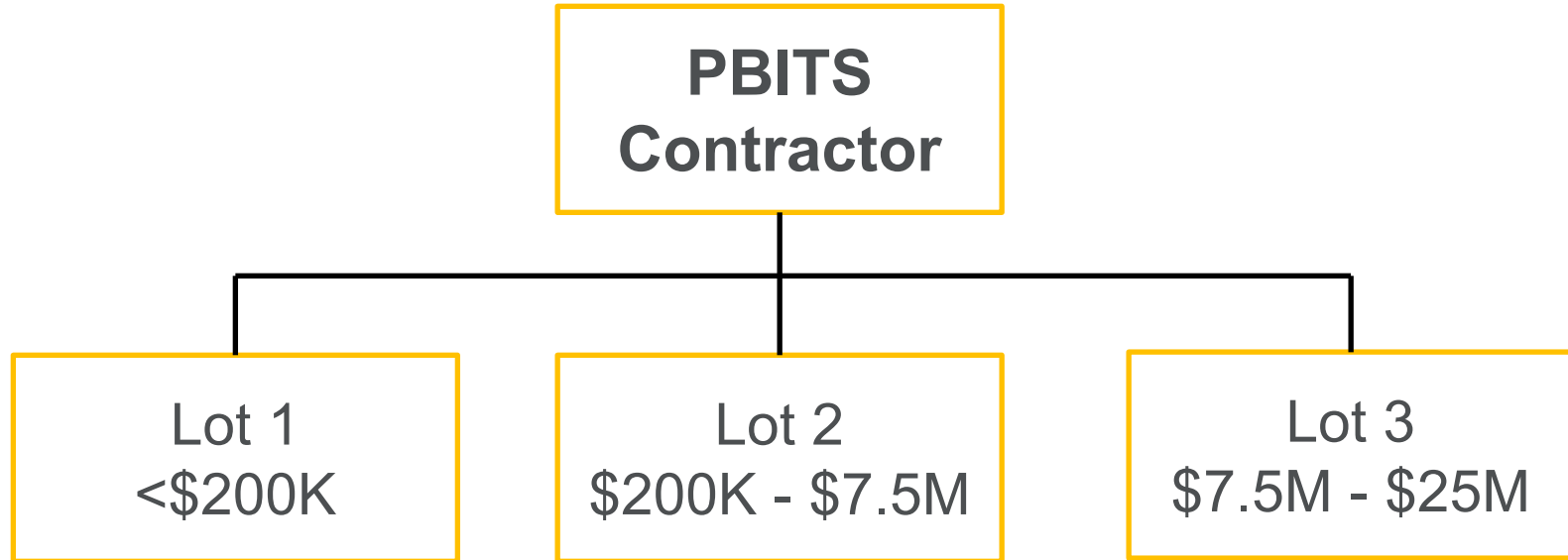
Examples of Eligible Projects:

- Project management support services
- Data categorization
- Data information management (migration, conversion, manipulation, integration)
- Implementation of open-source software

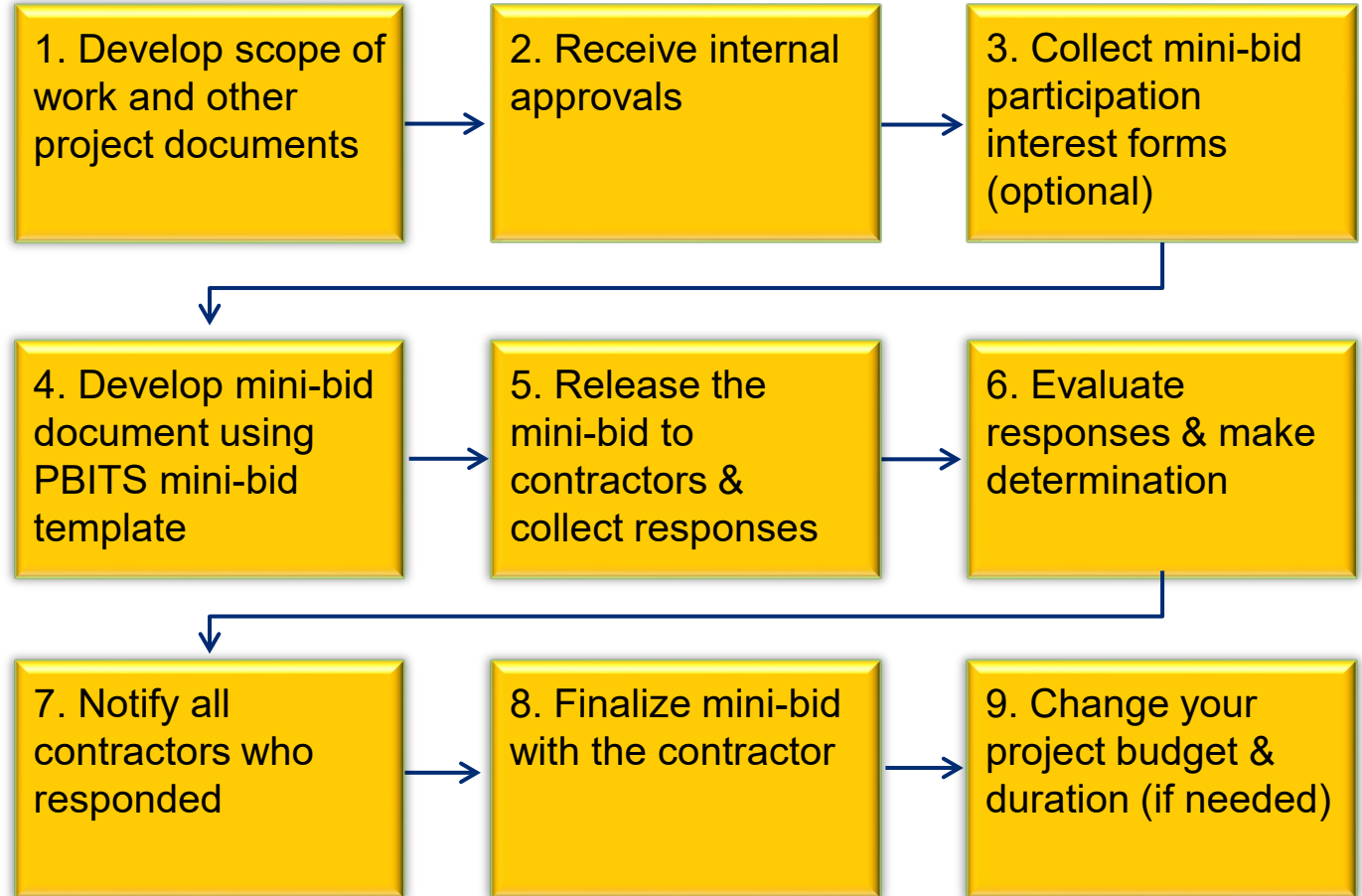


PBITS Contract Structure

- The contract is divided into lots based on anticipated project cost



PBITS: Process Overview










PBITS Benefits to You

- Contractor responsible for producing a viable product
- Diversity of contractors
- Up to 36-month engagements at transaction level
- Ability to require additional insurance at transaction level
- Enhancement budget is available

PBITS Considerations for Success

- Read the How to Use
- Clearly define your scope of work
- Don't be intimidated - use the templates
- Use measurable deliverables
- Maximize knowledge transfer opportunities

The PBITS Landing Page

Project Based Information Technology Consulting Services (PBITS)	
Award Document  (Updated / Revised)	Contract Period: September 09, 2015 - September 08, 2024
Contract Updates 	Group: 73600 Award: 22772
Contractor Information 	Use of Contracts: All State Agencies and Non-State Agencies
Template Page 	Contact Person: Charles Strickland Telephone: (518) 473-8710
Mailing List By Lot	Contract Issued: September 17, 2015 Contract Updated: March 23, 2022
Contractor Template Page 	
How To Use 	
Historical Information 	
Customer Service	
Description: <p>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.</p> <p>Authorized Users Contact: PBITS.AuthorizedUsers@ogs.ny.gov Contractors Contact: PBITS.Contractors@ogs.ny.gov</p> <p>Install Free Adobe Acrobat Reader for PDF Documents</p>	

[Template Page](#) 

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

Resources for PBITS



**Office of
General Services**

**Procurement
Services**

Corning Tower, Empire State Plaza, Albany, NY 12242 | www.nyspro.ogs.ny.gov | customer.services@ogs.ny.gov | 518-474-6717

TEMPLATE INFORMATION

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

AWARD: [22772](#) **CONTRACT PERIOD:** *Contract Approval & End Dates*
(Various – See Contractor Information Page)

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](#)



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PBITS in the Trifecta



Umbrella Contracts: Manufacturer and Distributor

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Umbrella Manufacturer and Distributor Contracts

- These contracts are used to obtain IT products from the manufacturer or one of their designated resellers for the contract, or from the distributor in cases where the items are not available from the manufacturer
 - Manufacturer Umbrella - hardware, software, cloud and implementation services
 - Distributor Umbrella– only hardware and software

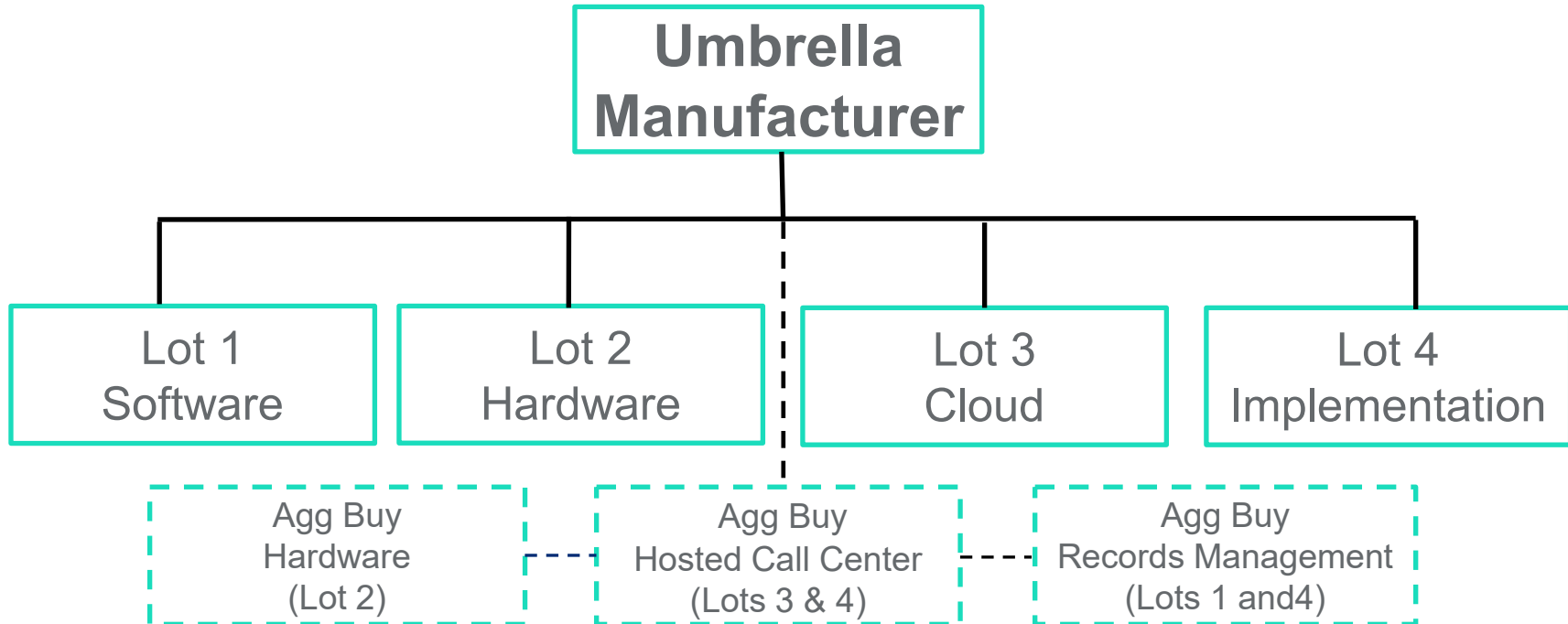


Umbrella Manufacturer and Distributor Contracts

	Manufacturer Umbrella	Distributor Umbrella
Vendor Type	Manufacturers and their Resellers	Distributors only
Vendor Pool	125+ Manufacturers/600+ Resellers	4 Distributors (infinite manufacturers)
Lots/Products	4 Lots - Hardware, Software, Cloud, Implementation	2 Lots – Hardware, Software
Pricing Model	Discount from List	Cost-plus
Purchasing Model	Mini-Bid Required	Mini-Bid Required
Purchasing Benefits	A single transaction can be made within any of the Lots individually or across multiple Lots	A single transaction can be made within each Lot or across both Lots

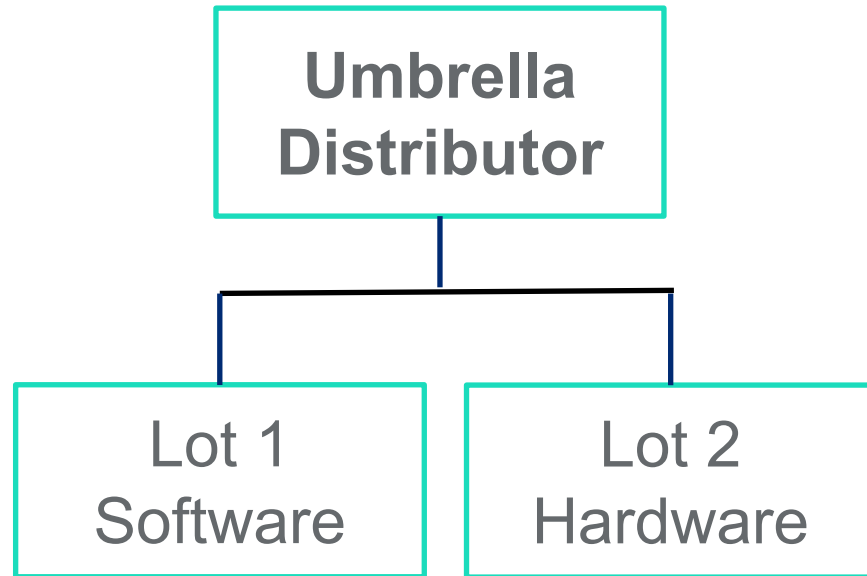
Umbrella Manufacturer Structure

- The contract is divided into lots based on product type

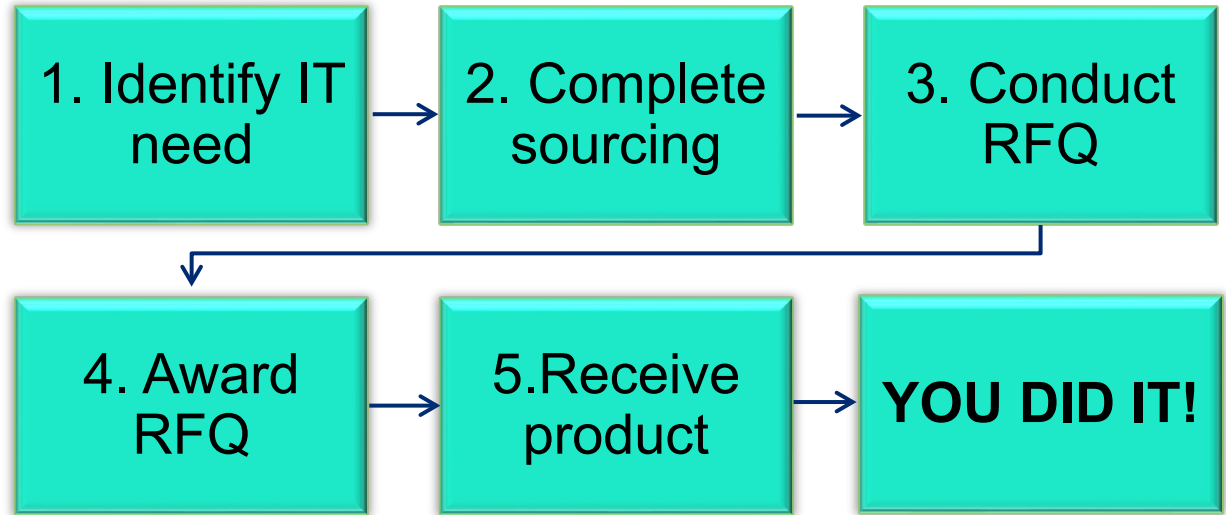


Umbrella Distributor Structure

- The contract is divided into lots based on product type









Manufacturer & Distributor: Process Overview











Umbrella Considerations for Success

- Read the How to Use
- Use the templates
- Clearly define technology needs
- Maximize knowledge transfer opportunities

Resources for Umbrella Contracts

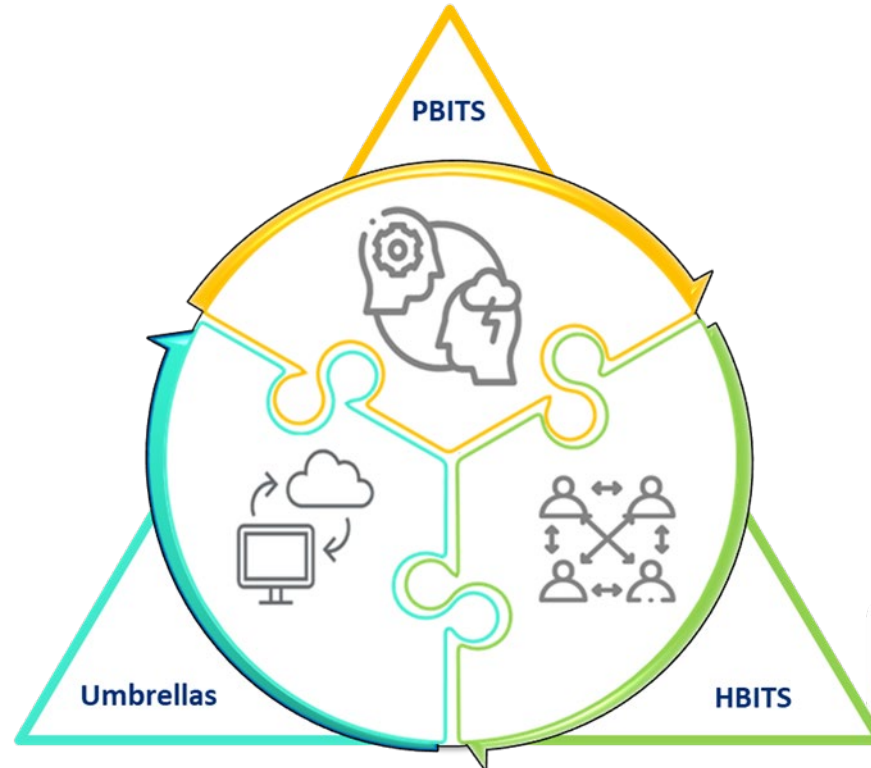
INFORMATION TECHNOLOGY UMBRELLA CONTRACT – MANUFACTURER BASED (STATEWIDE)	
<p>*IMPORTANT* PLEASE (CLICK HERE) BEFORE USING THIS CONTRACT</p>	
Award Document  (Updated / Revised)	Contract Period: November 30, 2015 – November 29, 2022
Contract Updates 	Group: 73600 Award: 22802
Contractor Information 	Use of Contracts: All State Agencies & Non-State Agencies
How To Use & Template Page 	Contact Person: Alexis Bredencko or Jordan Flores Telephone: 518-474-1358 or 518-474-3166
Base Contract & Appendices 	Authorized Users: MfrUmbrella.AuthorizedUsers@ogs.ny.gov
Listing of Contractors & Resellers	Contractor: MfrUmbrella.Contractors@ogs.ny.gov
Aggregate Buy 	Aggregate Buy: OGS.sm.PS.AggregateBuy@ogs.ny.gov
Historical Details 	Contract Issued: December 10, 2015 Contract Updated: April 7, 2022
Customer Service	
<p>Description: Information Technology Umbrella Contract – Manufacturer Based (Statewide)</p> <p>Contractor Pricelists can also be viewed on the COMeT portal, which is available at the following Website: https://ogs.ny.gov/comet</p> <p>Install Free Adobe Acrobat Reader for PDF Documents</p>	

Information Technology Umbrella Contract – Distributor Based (Statewide)	
Award Document  (Updated / Revised)	Contract Period: December 07, 2016 - December 06, 2026
Contract Updates 	Group: 73600 Award: 22876
Contractor Information 	Use of Contracts: All State Agencies and Non-State Agencies
How To Use 	Contact: Sean McManus Telephone: (518) 473-5917
RFQ Templates 	
Contractor Mailing List	Contractor: Ogs.sm.ps.DistUmbrella.Contractors@ogs.ny.gov
Contractor Templates 	Authorized Users: Ogs.sm.PsDistUmbrella.AuthorizedUsers@ogs.ny.gov
Base Contract & Appendices 	Contract Issued: December 14, 2016 Contract Updated: March 15, 2022
Historical Details 	
Customer Service	
<p>PROHIBITED LISTS: Hardware and/or Software</p> <p>Description: The Information Technology Umbrella Contracts – Distributor Based Software and Hardware Contracts streamline the procurement of certain Software, Hardware and Related Services not listed as excluded from the scope of this Contract for Authorized Users of NYS OGS Centralized Contracts. Products required by an Authorized User can be obtained via an expedited competitive Request for Quotes process. Authorized User Agreements awarded as a result of RFQs under this Centralized Contract will be awarded based on Lowest Price.</p> <p>THIS CONTRACT PROHIBITS THE SALE AND PURCHASE OF ALL CLOUD PRODUCTS.</p> <p>Install Free Adobe Acrobat Reader for PDF Documents</p>	

Umbrellas in the Trifecta



The IT Trifecta



Trifecta - the Big Picture

- The three elements of the IT Contracting Trifecta are:
 - Project Plan (PBITS)
 - People (HBITS)
 - Products (Umbrellas)
- Be R.E.A.L. about your in-house expertise and resources
- Use the right contracts and their respective How to Use docs
- Maximize knowledge transfer opportunities from contractors

We're Here to Help!

❖ Hourly Based IT Services - HBITS:

State Agencies: HBITS.StateAgencies@ogs.ny.gov

Non-Executive Agencies: HBITS.NonExecutiveAgencies@ogs.ny.gov

❖ Project Based IT Consulting Services - PBITS:

PBITS.AuthorizedUsers@ogs.ny.gov

❖ Manufacturer Based IT Umbrella:

MfrUmbrella.AuthorizedUsers@ogs.ny.gov

❖ Distributor Based IT Umbrella:

PSDistUmbrella.AuthorizedUsers@ogs.ny.gov



Additional Resources

How to Write a Good Scope of Work (2019 GovBuy)

<https://ogs.ny.gov/procurement/2019-ny-govbuy-how-write-good-scope-work-0>

Specifications and Scopes of Work Made Easy (2018 GovBuy)

<https://ogs.ny.gov/system/files/documents/2019/06/Specifications%20and%20Scopes%20of%20Work%20Made%20Easy.pdf>

How to Procure using PBITS (2018 GovBuy)

<https://ogs.ny.gov/procurement/2018-ny-govbuy-it-project-based-information-technology-services-pbits-contracts>

For all GovBuy material visit: <https://ogs.ny.gov/nygovbuy>

Additional Resources

How to Procure using HBITS (2019 GovBuy)

https://ogs.ny.gov/system/files/documents/2019/05/22_PBITS_HBITS_Case%20Studies.pdf

How to Procure using Umbrella contracts (2019 GovBuy)

https://ogs.ny.gov/system/files/documents/2019/05/21_GovBuy%20Umbrella%20IT%202019%20041619%20-%20revised.pdf

How to Procure using Umbrella contracts (2018 GovBuy)

https://ogs.ny.gov/system/files/documents/2019/06/IT%20Umbrella_1.pdf

For all GovBuy material visit: <https://ogs.ny.gov/nygovbuy>

Questions?

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