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# IT Umbrella Manufacturer and Distributor Contracts

## Case Studies in How to Procure IT Products



April 30 & May 1, 2019

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# Presenters

- OGS Procurement Services
  - Sean McManus
  - Jordan Marryott
  - Alexis Bredenko
  - Jessica LaFlamme
- NYC Department of Information Technology & Telecommunications (DoITT)
  - Rachel Laiserin





# Restricted Period Currently In Effect

## 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.

### Designated Contact Email

Manufacturer Based IT Umbrella:

[PS\\_SW\\_ITF@ogs.ny.gov](mailto:PS_SW_ITF@ogs.ny.gov)

OGS Restricted Periods List:

<https://ogs.ny.gov/restricted-period-list-procurement-designated-contacts>



# Agenda

1. IT Centralized Contract Suite Overview
2. The Umbrella Manufacturer Contract
3. Aggregate Buys
4. The Umbrella Distributor Contract
5. Case Study
6. Question & Answer

# IT Centralized Contract Suite Overview

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# IT Centralized Contract Suite Overview

- HBITS – Hourly Based IT Services
- PBITS – Project Based IT Consulting Services
- IT Manufacturer Based Umbrella
  - Aggregate Buys
- IT Distributor Based Umbrella

# IT Centralized Contract Suite Features

The contracts are designed to:

1. Offer a wide variety of products and services
  - Whatever your IT needs, there's an IT centralized contract for you
2. Level the playing field
  - Terms and conditions for all vendors in each contract group are the same
3. Utilize standardized forms and templates
  - Uniform templates and forms to make the request for quote (RFQ) process more streamlined for Authorized Users (AUs)

# IT Manufacturer Umbrella Contract

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# Umbrella Manufacturer Contract Overview

## Contract Breakdown:

- Lot 1 – Software
- Lot 2 – Hardware
- Lot 3 – Cloud
- Lot 4 – Implementation

# Product and Services Offered

Lot 1 – Software	Lot 2 – Hardware	Lot 3 – Cloud	Lot 4 - Implementation
Software Licenses	Laptops / Desktops	Enterprise Cloud	Implementation of Lot 1-3
Software Maintenance	Servers	Fleet Management	Customized Training
Software Installation	Printers*	Network Monitoring	Business Process Analysis
Configuration Services	Electronic Whiteboards*	Cloud Solution Support	Data Conversion
Pre-Packaged Training	Appliances	Maintenance of Cloud	Programming Services
Fleet Management	UPS Systems*	Self-Service Portal*	
Legacy Maintenance*	Telecom Hardware	Pre-Packaged Training	

# Umbrella Manufacturer Contract Overview

## 141 Contractors:

- 70 Contractors from original contract
- 71 new contractors from first Periodic Recruitment (PR1)
- PR2 is anticipated and will add new manufacturers as a result

## 605 Resellers including the following designations:

- SBE – 213 vendors
- MBE – 62 vendors
- WBE – 69 vendors
- SDVOB – 14 vendors

**8x8 Inc \* Accenture LLP \* Acquia Inc \* Admit Computer Services Inc \* Aerohive Network Inc \* AgileAssets Inc \* ALE USA Inc \* Applied Voice & Speech Technologies Inc \* Arista Networks Inc \* AskReply Inc d/b/a B2Gnow \* Assetworks LLC \* AT&T Corp \* AutoMon LLC \* Avaya Inc \* Aver Information Inc \* Aviat US Inc \* BMC Software Inc \* Buffalo Computer Graphics Inc \* Business Purchasing Solution LLC d/b/a SpendBridge \* Canon USA Inc \* Carahsoft Technology Corporation \* Center for Internet Security Inc \* Centripetal Networks Inc \* CenturyLink Communications LLC \* CGI Technologies and Solutions Inc. \* Check Point Software Technologies Inc \* Ciena Government Solutions Inc \* Cisco Systems Inc \* Citrix Systems Inc \* Colyar Technology Solutions LLC \* Compulink Management Center Inc d/b/a Laserfiche \* Compuware Corporation \* Contemporary Computer Services Inc \* ConvergeOne Inc (formerly known as Annese & Associates Inc) \* CrowdStrike Inc \* Currier McCabe and Associates Inc d/b/a CMA Consulting Services \* Cylance Inc \* Dataminr Inc \* Dell Marketing LP \* DiRAD Technologies Inc \* Docker Inc \* DocuSign Inc \* Eccentex Corporation \* EMC Corporation d/b/a EMC of Massachusetts \* Enforcement Video LLC d/b/a WatchGuard Video \* Enterprise Services LLC (formerly known as HP Enterprise Services LLC) \* Environmental Systems Research Institute Inc d/b/a ESRI \* Ergotron Inc \* Extreme Networks Inc \* F5 Networks Inc \* FireEye Inc \* ForeScout Technologies Inc \* Fortinet Inc \* Fujitsu America Inc \* Genesys Telecommunications Laboratories Inc \* Getac Incorporated \* Google LLC \* Granicus LLC d/b/a Granicus (formerly known as GovDelivery Inc) \* Hewlett-Packard Enterprise Company \* Hitachi Data Systems Corporation \* HP Inc \* ImageWork Technologies Corporation \* Impulse Point \* Info Tech Inc \* Infor Public Sector Inc \* Information Builders Inc \* International Business Machine d/b/a IBM \* Intralogic Solutions Inc \* Juniper Networks (US) Inc \* Kinney Management Services LLC \* Konica Minolta Business Solutions USA Inc \* Kova Corp \* Kronos Incorporated \* Kyocera Document Solutions America Inc \* LCPtracker Inc \* Lenovo (United States) Inc \* Lenovo Global Technology (United States) Inc \* Lexmark International Inc \* LoadSpring Solutions Inc \* Lumen Inc \* Micro Focus Software Inc \* MicroStrategy Services Corporation \* Mitel Cloud Services Inc \* Mutualink Inc \* NaviSite Inc \* NEC Corporation of America \* NetApp Inc \* NICE Systems Inc \* Niche Technology Inc \* Nimble Storage Inc \* Nokia of America Corporation (formerly known as Alcatel Lucent USA Inc) \* NTT Data Inc \* Okta Inc \* Open Text Inc \* Oracle America Inc \* Palo Alto Networks Inc \* Panasonic Corporation of North America d/b/a Panasonic System Communications \* Pitney Bowes Software Inc \* Pluralsight LLC \* Polycom Inc \* Pure Storage Inc \* RedSky Technologies Inc \* RGB Systems Inc \* Ricoh USA Inc \* RingCentral Inc \* Ruckus Wireless Inc \* SailPoint Technologies Inc \* Samsung Electronics America Inc \* SAS Institute Inc \* Schneider Electric IT USA Inc \* SecureAuth Corporation \* Sedara LLC \* Seneca Data Distributors Inc \* Sharp Electronics Corporation \* ShoreTel Inc \* Siteimprove Inc \* Skyline Network Engineering LLC d/b/a Skyline Technology Solutions \* Socrata Inc \* Sophos Inc \* Source Code Corporation \* Splunk Inc \* Storage Engine Inc \* TeamDynamix Solutions LLC \* Technolutions Inc \* Tequipment Inc \* Teradata Operations Inc d/b/a Teradata Government Systems LLC \* Tintri Inc \* Toshiba America Business Solutions Inc \* Tripp Manufacturing Company d/b/a Tripp Lite \* TriTech Software Systems \* Unisys Corporation \* Universal Management Technology Solutions Inc d/b/a Universal Management Solutions \* Varonis Systems Inc \* Verizon Business Network Services Inc \* Versaterm Inc \* Vertiv Corporation (formerly known as Liebert Corporation) \* VMware Inc \* Webair Internet Development Company Inc \* Widepoint Integrated Solutions Corporation \* Xerox Corporation d/b/a Xerox \* Zebra Technologies International LLC**



Information Technology Umbrella Contract – Manufacturer Based  
(Statewide)

**\*IMPORTANT\***

**PLEASE ([CLICK HERE](#)) BEFORE USING THIS CONTRACT**

<a href="#">Award Document</a>  <small>{Updated / Revised}</small>	<b>Contract Period:</b> November 30, 2015 – November 29, 2020
<a href="#">Contract Updates</a> 	<b>Group:</b> 73600 <b>Award:</b> 22802
<a href="#">Contractor Information</a> 	<b>Use of Contracts:</b> All State Agencies & Non-State Agencies
<a href="#">How To Use &amp; Template Page</a> 	<b>Contact Person:</b> Jordan Marryott or William Purtell <b>Telephone:</b> (518) 486-2043 (518) 474-3560
<a href="#">Base Contract &amp; Appendices</a> 	<b>Authorized Users:</b> MfrUmbrella.AuthorizedUsers@ogs.ny.gov
<a href="#">Aggregate Buy</a> 	<b>Contractor:</b> MfrUmbrella.Contractors@ogs.ny.gov
<a href="#">Listing of Contractors &amp; Resellers</a>	<b>Contract Issued:</b> December 10, 2015 <b>Contract Updated:</b> April 15, 2019
<a href="#">Historical Details</a> 	
<a href="#">Customer Service</a>	

# RFQ Process Overview

1. Develop your RFQ
2. Release your RFQ
3. Conduct a Question & Answer (optional)
4. Collect RFQ Responses
5. Evaluate RFQ Responses
6. Make a Final Determination
7. Notify all Contractors / Resellers who responded
8. Develop your Authorized User Agreement



# Develop Your RFQ

- Consult Appendix G.a - How to Use the Manufacturer Umbrella Contract
- Identify the type of product or service are you looking to procure
- Is there a specific SKU in mind?
- Is this a basic request for quote or a complex request for quote?
- Does the product or service include cloud?





# Release Your RFQ

- Does the desired manufacturer have at least five resellers?
- Use the listing of contractors & resellers found on the web to copy and paste email addresses
- Make sure all applicable attachments are included
- If a contractor or reseller asks a question, make sure the response is provided to all potential bidders



# Collect and Evaluate RFQ Responses

- Collect at least three responsive proposals
- Quotes must be evaluated based on the RFQ's pre-defined methodology
- Check the applicable contractor pricelist to ensure the products are on contract and the prices are acceptable

# Make a Final Determination / Close Out

- The winning bidder will be the one that met the basis of award outlined in the RFQ
- Notify all contractors and resellers who responded
- Develop your Authorized User Agreement
- Follow your organizations policy and procedures to execute the transaction

# Aggregate Buys

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# Umbrella Manufacturer – Aggregate Buys

Aggregate Buys are centralized RFQs completed by OGS for products that are determined to be in high demand. This process:

- Encourages contractors to offer higher discounts due to a large projected spend
- Creates an agreement which can be utilized by Authorized Users thereby eliminating the RFQ process for Authorized Users
- Allows purchases of these products to be made by submitting a PO directly to the awarded contractor

# Umbrella Manufacturer – Aggregate Buys

Aggregate buys OGS has completed:

1. RFQ 18-01: Aggregate Hardware Buy
2. RFQ 18-02: Law Enforcement Records Management System
3. RFQ 16-2: Hosted Contact Center

The suite of aggregate buys will be expanded as time allows and customer demand requires

# Umbrella Manufacturer – Aggregate Buys

The following configurations are part of RFQ 18-01:

1. VDI PC
2. Enterprise Desktop
3. Enterprise Notebook
4. All – in- One
5. Non-Convertible Tablet
6. Convertible Tablet
7. Workstation PC
8. Education Desktop
9. Education Notebook
10. Chromebook Low (Non-Touch)
11. Chromebook Touch
12. Unbundled Displays



Information Technology Umbrella Contract – Manufacturer Based  
(Statewide)

**\*IMPORTANT\***

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<a href="#">Customer Service</a>	

<https://www.ogs.ny.gov/purchase/snt/awardnotes/7360022802can.htm>



# Umbrella Manufacturer – Aggregate Buys

Enterprise Desktop	
Component	Specification Requirement
CPU / Chipset	Intel Core i5 (8th generation or better) (non mobile, Intel Core i5 only)
RAM	8GB 2400MHz DDR4 expandable to 16GB (1x8 GB)
Internal Hard Drive	128GB SATA 2.5 SSD (M.2 is acceptable substitute)
Video	Integrated Intel 630 graphics or better

Enterprise Desktop Options/Additional Products	
Option Category	Component
Warranty & Services	Agency Specific Factory Imaging
Component	Upgrade to 8th generation (or better) Intel i7 CPU only
Peripheral	Over the ear stereo headset (the headset must cover both ears)

# Umbrella Manufacturer – Aggregate Buys

Enterprise Notebook	
Component	Specification Requirement
<b>CPU / Chipset</b>	8th generation Intel Core i5 only
<b>RAM</b>	8GB 2400MHz DDR4 expandable to 16GB (1x8 GB)
<b>Internal Hard Drive</b>	128GB SATA 2.5 SSD (M.2 is acceptable substitute)
<b>Video</b>	Integrated Intel 620 graphics or better

Enterprise Notebook Options/Additional Products	
Option Category	Component
<b>Warranty &amp; Services</b>	Agency Specific Factory Imaging
<b>Component</b>	Upgrade to 8th generation Intel i7 CPU only
<b>Peripheral</b>	Charging docking station

# Umbrella Manufacturer – Aggregate Buys

Education Desktop	
Component	Specification Requirement
CPU	Intel Core i5 8th generation (non mobile, Intel Core i5 only)
RAM	8GB 2400MHz DDR4 expandable to 16GB (1x8 GB)
Internal Hard Drive	128GB SATA 2.5 SSD (M.2 is acceptable substitute)
Video	Integrated Intel 630 graphics or better

Education Desktop Options/Additional Products	
Option Category	Component
Warranty & Services	Agency Specific Factory Imaging
Component	Upgrade to 8th Generation Intel Core i7 CPU only
Peripheral	Over the ear stereo headset (the headset must cover both ears)

# Umbrella Manufacturer – Aggregate Buys

Education Notebook	
Component	Specification Requirement
CPU	8th Generation Intel Core i5 only
RAM	8GB 2400MHz DDR4 expandable to 16GB (1x8 GB)
Internal Hard Drive	128GB SATA 2.5 SSD (M.2 is acceptable substitute)
Video	Integrated Intel 620 graphics or better

Education Notebook Options/Additional Products	
Option Category	Component
Warranty & Services	Agency Specific Factory Imaging
Component	Upgrade to 8th Generation Intel Core i7 CPU only
Peripheral	Protective carrying case

# Umbrella Manufacturer – Aggregate Buys

Installation Regional Discounts for Aggregate Hardware Buy RFQ #18-01			
Region 1 - Western NY - Buffalo	*Discount Percentage*	Region 6 - Capital Region–Albany	*Discount Percentage*
Region 2 - Finger Lakes –Rochester	*Discount Percentage*	Region 7 - Mid-Hudson–Poughkeepsie	*Discount Percentage*
Region 3 - Southern Tier–Binghamton	*Discount Percentage*	Region 8 - New York City–NYC	*Discount Percentage*
Region 4 - Central NY–Syracuse	*Discount Percentage*	Region 9 - Long Island–Melville	*Discount Percentage*
Region 5 - Mohawk Valley–Utica	*Discount Percentage*	Region 10 - North Country–Watertown / Plattsburgh	*Discount Percentage*

# IT Umbrella Distributor Contract

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# Umbrella Distributor Overview

- Five contractors (distributors) – large account resellers
  - Dell Marketing LP
  - IC Logic Inc. d/b/a USAT Corp
  - Insight Public Sector Inc.
  - PCMG Inc.
  - SHI International Corporation
- Lots:
  - Lot 1 – Software
  - Lot 2 - Hardware

# Umbrella Distributor Overview

- **Distributor (Contractor)** – Large account reseller of the product
- **Manufacturer** – Maker of the product
  - OGS has a signed contract with the distributor (contractor), not the manufacturer
  - Authorized users enter into an agreement with the distributor through the RFQ process, and the distributor enters into an agreement with the manufacturer



# Umbrella Distributor Overview

- Similar to the expired miscellaneous software contract, but with a hardware lot
- Cloud products are excluded from this contract
  - On-premise products with cloud options can be purchased, but authorized users must not use the cloud options



# Umbrella Distributor Overview

- Authorized users can solicit quotes for IT related software or hardware as long as the product manufacturer doesn't hold another OGS contract for the same product (example: umbrella manufacturer, etc)
- The prohibited lists specify the manufacturers available through another OGS contract. There are separate prohibited lists for each Lot
- Distributors cannot sell their own products

## Question: Can I buy this product on the umbrella distributor contract?

**Answer:** You can buy it on the distributor contract if:

- 1) The product is non-cloud IT software or hardware
- 2) The manufacturer is not listed on the prohibited list

# Umbrella Distributor Price Lists

- Distributor Price Lists have Cost-Plus/Cost-Minus Percentages
- Cost-Plus: Percentage added to the amount the contractor pays the vendor. Example:
  - Contractor pays \$100 for the product
  - Cost-Plus Percentage: 5%
  - Cost to the Authorized User = \$105
- Cost-Minus: Percentage subtracted from the amount the contractor pays the vendor. Example:
  - Contractor pays \$100 for the product
  - Cost-Minus Percentage: 5%
  - Cost to the Authorized User = \$95

# Umbrella Distributor RFQ Process

- 1) Request for quotes (RFQ) are used to get pricing from distributors on contract - awards must be made on lowest price
- 2) RFQs are mandatory and must be sent to all five contractors
- 3) On the distributor website:
  - RFQ templates
  - How to use
  - Contractor mailing list



# Umbrella Distributor RFQ Process

- Authorized users are encouraged to use the RFQ templates
  - Designed specifically for the distributor contract
  - Provides consistency for the contractors
  - If using your own template, be sure it references Group 73600, Award 22876 Information Technology Umbrella Contracts – Distributor Based (Statewide). Be sure that your own template contains all the information in the distributor template.
  - Information for contractors should be included in the Scope section of the RFQ so all contractors receive the same information





# Umbrella Distributor RFQ Process

- Authorized users can add additional terms and conditions to the RFQ
  - Language for holding pricing can be added to the RFQ. There is sample language about holding pricing in the Distributor How to Use document.
  - Authorized users can require the contractor to provide the quote they received from the manufacturer. The following language is in the Distributor RFQ template:

***The Authorized User reserves the right to require the Contractor to supply a copy of the quote the Contractor received from the Manufacturer for any Products included in this RFQ.***





# Umbrella Distributor - Authorized User Responsibilities

## 1) Evaluation of quotes

- Award must be made based on lowest price

## 2) Required no-bid canvass

- When less than three responsive bids are received, an authorized user must canvass all the no-bids and no-replies

## 3) Notification of quote results

- The authorized user must notify the awardee and non-awardees of the RFQ results

# NYC DOITT

Information Technology &  
Telecommunications

Presented by: Rachel Laiserin

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# NYC Use of OGS Contracts Background

- NYC agencies are federated and IT procurement is distributed across multiple agencies
- DoITT serves as the Center of Excellence for IT for NYC
- Hosted data center for 20+ NYC agencies
- Manage city network
- Establish and maintain citywide contracts
- Provide IT expertise (tech and procurement perspectives)

# How Does NYC Use OGS Contracts?

- When NYC agencies purchase from OGS, we don't just place orders on contracts – we go through our own procurement process and use methods known in NYC Procurement Policy Board (PPB) rules as intergovernmental
- Intergovernmental contracts require agencies to put their own cover agreement on top of OGS terms and conditions and compliance with NYC rules, regulation and policies, including:
  - City MWBE
  - Cyber Review
  - Cloud Review
  - Negotiated EULAs
  - Local Law 63



# How Does NYC Use OGS Contracts?

- Intergovernmental contracts go through NYC oversight reviews (Office of Management and Budget, Mayors Office of Contracts, NYC Law Department and NYC Comptroller)
- DoITT sometimes creates citywide master agreements for use by all NYC agencies by piggybacking on OGS contracts (via intergovernmental method)



# NYC Use OGS Contracts – IT Umbrella

- Manufacturer based – most common
  - Lots 1 – 4 all utilized
- Distributer based
  - Cloud exclusion makes NYC use more limited
- Follow OGS-required RFQ processes and take advantage of aggregate buys

# Benefits of Using OGS Contracts

- Cycle time is improved vs. open request for proposals
- Vendors are already vetted
- Minimum discounts already negotiated
  - Often better than GSA
- Terms and conditions are favorable to NYS
- NYS and NYC are closely aligned on goals around data protection, indemnification, limitation of liability and security provisions



# When Does NYC Not Use OGS?

- NYC agencies (DoITT primarily) establish their own contracts for similar services
  - Staff augmentation (a la HBITS)
  - System integration (a la PBITS)
    - Lot 1 for MWBE was particularly helpful before NYC was granted \$150,000 discretionary award method
  - Telecom MSAs (a la CTS)

# When Does NYC Not Use OGS?

- Products NOT available via OGS
  - Cloud solutions not on umbrella contract
- Manufacturers add terms and conditions to order documents that are problematic to NYC

# Questions?

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