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Hourly-Based & Project-Based IT Services Contracts



Case Studies in How to Procure IT Services



April 30 & May 1, 2019

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Agenda

- How to use these contracts
- Where to find helpful resources
- Review of case studies
- Who to contact with questions

Speakers

- Anthony Montes
- Susan Obercon & Sarah Berte
- Charles Strickland
- Steven Charles
- Daniel Blake
- PBITS Users from SED, OMH & DOT
 - Richard Duprey
 - Paul Murray & William Gwen
 - David Mackey





Restricted Periods Currently In Effect

Designated Contacts

- Information Technology Umbrella
Contract Manufacturer Base
PS_SW_IFT@ogs.ny.gov
- Hourly Based Information Technology
Services
ogs.sm.ps_hbits@ogs.ny.gov

OGS Restricted Periods List

<https://nyspro.ogs.ny.gov/content/restricted-periods-list>

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.



IT Centralized Contract Suite Overview

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IT Contracts

Components of the OGS Information Technology Contracting Suite:

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

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



HBITS:

- Hourly based
- Staff augmentation
- 2 to 24 months

PBITS:

- Project based
- Deliverables
- Up to 36 months

Hourly Based IT Services (HBITS)

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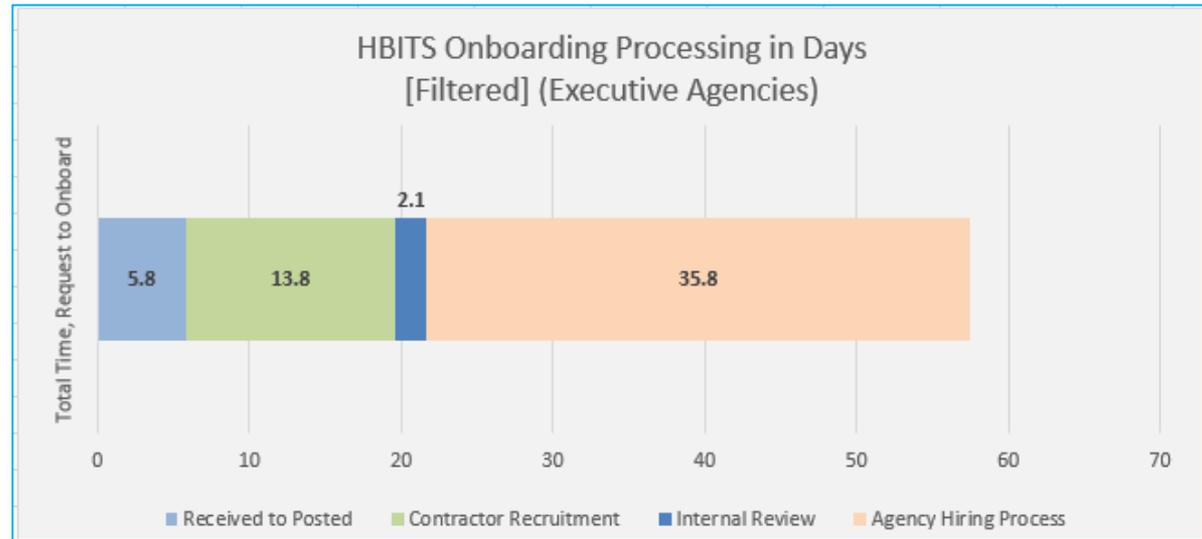
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HBITS

- Helps Authorized Users get IT services quickly
- Stimulates competition to lower costs
- Increases MWBE participation

HBITS Onboarding Process in Days

- Received to Posted
- Contractor Recruitment
- Internal Review
- Agency Hiring Process



Save Time – Reduce the Need for OGS Edits to Task Order Request Form

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Form 1: Task Order Request Form

Include the following documents with your Form 1 submission:

- Billing chart 
- If applicable, also include:
 - Expert Justification
 - Expedite Justification

Name of Person responsible for Approving Candidate's Time Card:	
Agency:	
Business Unit within Agency:	
Direct Phone Number:	
Email Address:	
Name of Person responsible for approving invoicing/billing payments:	
Agency:	
Business Unit within Agency:	
Direct Phone Number:	
Email Address:	

Form 1

- No blanks
- Request Date = Date Form 1 was sent to HBITS
- Agency = Agency responsible for payment
- Pre-approvals in place

Request Date:	5/16/19
Agency:	NYS Department of Health

Form 1

- Expert skill level requires written justification on a separate Word document

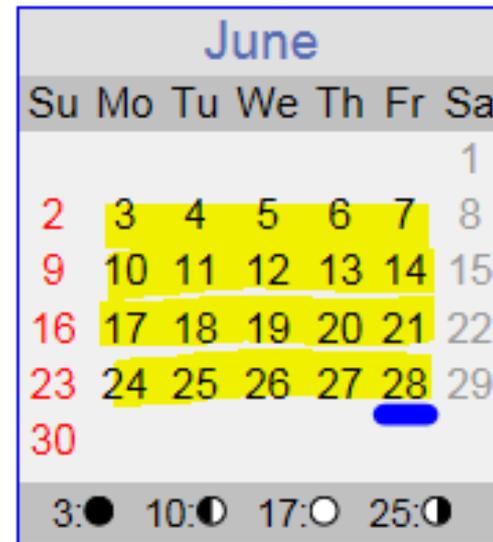
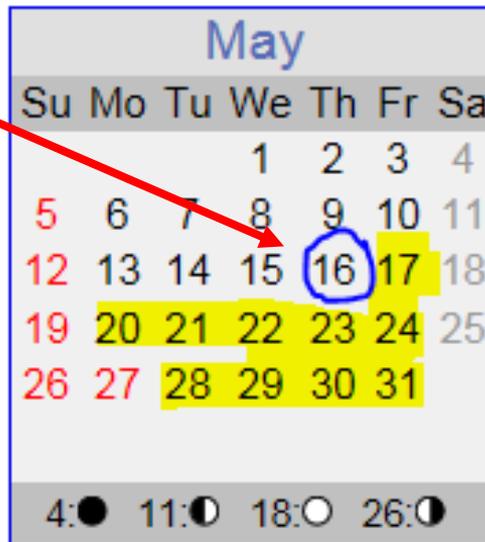
Which <u>Job Title Category</u> is required?	Technical Architect
Which <u>Skill Level</u> is required?	Expert



Form 1

For example, if Form 1 were submitted on 5/16/2019...

When is the Target Start Date ? (30 Business Days minimum from date of request)	6/28/19
How long is the engagement ? (in months)	24
When is the estimated completion date ?	6/27/21





Form 1

- Full or part-time
- Daily work hours

Is this a Full or Part-Time Position (Full time is considered 40 Hours Per Week)?	
<u>If Part-Time</u> , enter approximate number of hours per week:	
What are the daily work hours ? (note if negotiable or list preferred start and end time):	

Form 1

- Position mandatory qualifications
 - Position title
 - Skill level

Position Mandatory Qualifications	
Technical Architect: -Technical expert centered around a technology, technologies or a portfolio of applications -Designing and implementing Information Technology solutions	Pass/Fail
Expert Level – 84+ Months Candidate is able to provide leadership of large teams and/or extensive industry experience and is considered at the top of his/her field	

Form 1

Requested Qualifications

- Months is the only allowable unit of measurement
- Separate qualifications
- Do not target the incumbent
- Avoid non-quantifiable words such as large, preferred, strong
- Example of qualification that is not measurable:
 - 84 months of experience in managing multiple **large**, complex custom IT projects

Form 1

Requested Qualifications

- Example of a measurable qualification:
 - 84 months of experience in managing multiple large, complex custom IT projects defined primarily as those with the following characteristics: budget over \$1,000,000 annually, duration over 48 months, multiple funding sources including federal and grant funding, managing external stakeholders, multi-level project team organization, and deployment to geographically diverse end users.

Form 1

- Examples – Documents Not Required

Requested qualifications that cannot be scored

3.	84+ months of experience consuming and displaying data retrieved from REST service in a web-based business application.	11.25	15
4.	Bachelor's Degree	11.25	15
	Please submit a copy of the Certification with the Candidate Response Form.		
	Please submit a copy of the diploma for requested qualification #4 with your Form 2.		
	Candidate must participate in an on-site, in-person interview at the work office location listed above to be considered for the position.		
Requested Qualifications Must Always Total 80 Points For Maximum Score		60	80

Form 1

- In-person interviews
- Edits sent back

Reduce the Time it Takes Your Agency to Complete the Onboarding Process

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Timeline of Action & Due Dates

	Business Days	Forms
AGENCY	1 - 5 Days	Form 3A & Summary Sheet
	2 - 5 Days	Form 3B & Post Interview Summary Sheet

Form 3A Preliminary Technical Evaluation

- Have a pre-determined evaluation tool
- Score immediately
- Score based solely on Form 2
- 3A Form must be completed for each candidate

Example Preliminary Technical Evaluation Form 3A

- Score of “Zero” or “Max” points must include comment

<u>Requested Qualifications</u>					
<u>Qualification Number</u>		<u>Points Assigned for Meeting Qualifications (Always 75% of Max Points)</u>	<u>Points Assigned for Exceeding Qualifications (Max Points)</u>	<u>Candidate Score</u>	<u>Comments</u>
1.	Minimum 60 months experience in architecting, designing and implementing Oracle data marts and data warehouses	15	20	20	Candidate has 88 months in designing and implementing DW.



Form 3A Summary Form

- HBITS preliminary technical evaluation summary sheet must be completed
- Select candidates to be interviewed
- Return completed forms to HBITS within 5 business days



Example of Form 3A Summary Sheet

- Sorted highest to lowest in Total Score order
- Interview Requested?: Yes or No

Appendix F

HBITS Preliminary Technical Evaluation Summary Sheet

Summary Sheet: After completion of all the preliminary technical evaluations, please complete this form summarizing the results.

<u>Task Order Number</u>		<u>Date Of Completion</u>		
Candidates Selected for Interviews (minimum of three, maximum of 10 per position)				
*Must Interview Three (3) Highest Scoring Candidates Before Selecting a Lower Ranked Candidates				
<u>Candidate Ranking</u>	<u>Candidate Full Name</u>	<u>Contractor Name</u>	<u>Total Score</u>	<u>Interview Requested?</u>
1.	<u>Jamie Smith</u>	<u>Logic House Ltd.</u>	<u>80</u>	Yes
2.	<u>Stephen Walker</u>	<u>IIT Inc.</u>	<u>75</u>	Yes
3.	<u>Joshua Brown</u>	<u>Software People</u>	<u>70</u>	Yes
4.	<u>Ashley Williams</u>	<u>US Tech Solutions</u>	<u>70</u>	Yes
5.	<u>Benjamin Johnson</u>	<u>Knowledge Builders Inc</u>	<u>65</u>	No
6.	<u>Boris Taylor</u>	<u>PSI International</u>	<u>60</u>	No

During the Interview

- Be prepared
- In person and on-site interviews
- Require a current government-issued photo identification card
- No limitation on duration of interview
- Test candidates' knowledge, communication and interpersonal skills



Form 3B: Candidate Interview Evaluation Form & Post-Interview Summary Score Sheet

- For use by Executive and Non-Executive State Agencies to evaluate all candidate interviews



Form 3B: Candidate Interview Evaluation Form & Post-Interview Summary Score Sheet

Appendix F HBITS Post-Interview Summary Score Sheet

Summary Sheet: After completion of all the Candidate interviews, please complete this form summarizing the results.

<u>Task Order Number</u>		<u>Date:</u>		
<u>Candidate Ranking</u>	<u>Candidate Full Name</u>	<u>Contractor Name</u>	<u>Total Score</u>	<u>Candidate Selected for Position?</u>
1.	<u>Jamie Smith</u>	<u>Logic House Ltd.</u>	100	No- Declined Position
2.	<u>Stephen Walker</u>	<u>IIT Inc.</u>	85	Yes
3.	<u>Joshua Brown</u>	<u>Software People</u>	80	No
4.	<u>Ashley Williams</u>	<u>US Tech Solutions</u>	0	No



Onboarding

- Provide HBITS with onboarding details

Subject line: HBITS-0X-0XXXX 3B/Candidate Onboard

HBITS TASK ORDER NUMBER:

Agency's Name:

Contractor's Name:

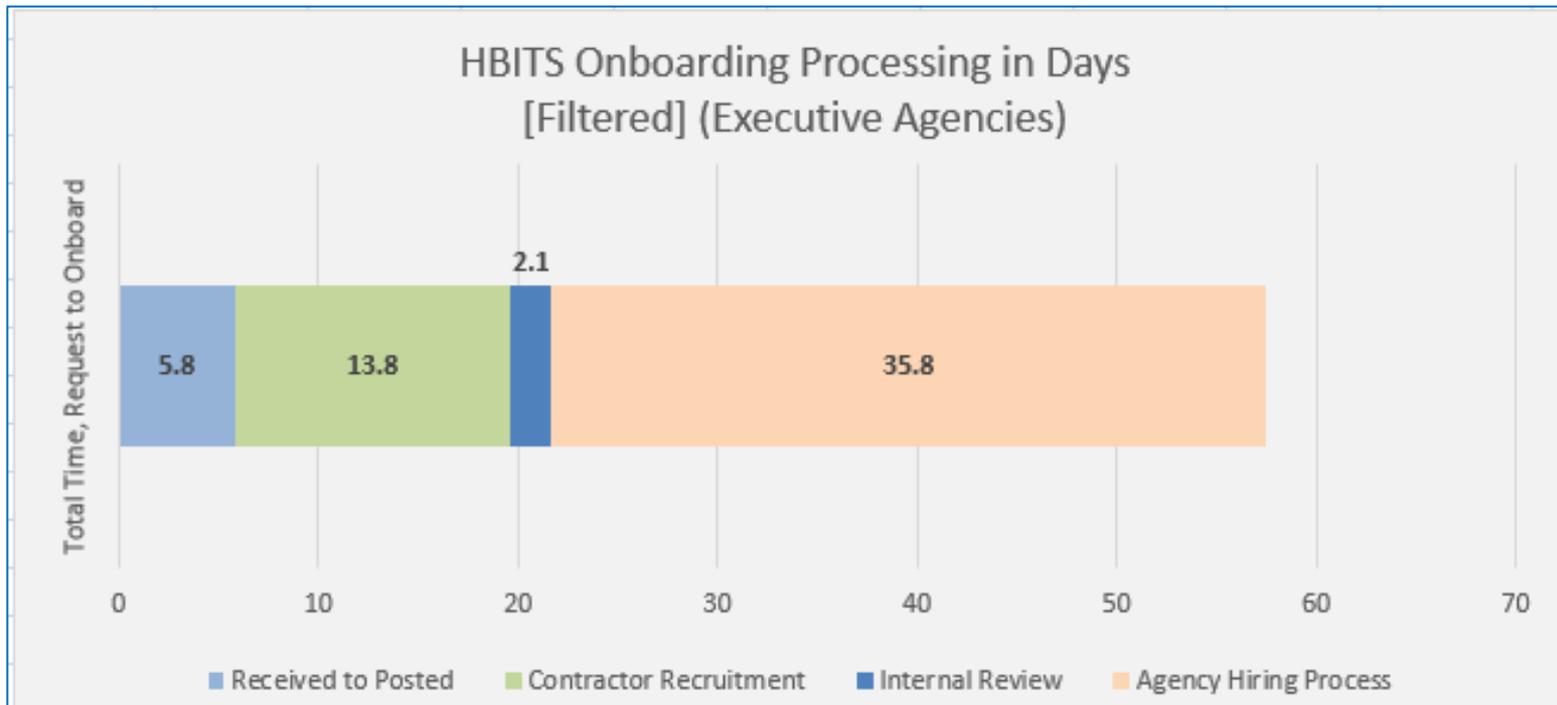
Candidate's Full Name:

Start Date:

Length of Engagement:

Hourly Bill Rate:

HBITS Onboarding Process in Days



HBITS Update

- Current contracts expire June 30, 2019
- Solicitation 23158 was issued to replace the current contracts and we do not expect any lapse in services
- Restricted period is in effect regarding this solicitation
- Please refer to the NYS procurement restricted period list at <https://ogs.ny.gov/procurement/restricted-period-lists> for a complete listing of all designated contacts



HBITS Team Contact Information

- For State Agencies: HBITS.StateAgencies@ogs.ny.gov
- For Contractors: HBITS.Contractors@ogs.ny.gov
- For Non-Executive Agencies: HBITS.NonExecutiveAgencies@ogs.ny.gov



Project Based IT Consulting Services (PBITS)

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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





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't 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



Resources on the OGS Website

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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: Nancy Dougherty Telephone: (518) 408-3265
Mailing List By Lot	Contract Issued: September 17, 2015 Contract Updated: April 3, 2019
Contractor Template Page 	
How To Use 	
Historical Information 	
Customer Service	
<p>Description:</p> <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 style="text-align: center;">Install Free Adobe Acrobat Reader for PDF Documents</p>	

Available Templates



Office of General Services
Procurement Services

Coming Tower, Empire State Plaza, Albany, NY 12242 | <https://ogs.ny.gov/procurement> | 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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NYS OGS - 73600 22772 x

Secure | <https://www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM>

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Template Page 	Contact Person: Nancy Dougherty Telephone: (518) 408-3265
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Contractor Template Page 	
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Case Studies from PBITS Mini-Bid Users

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PBITS Mini-Bid Users

NYSED

Senior Attorney, Contract Administration Unit

- Richard Duprey

NYSOMH

- Paul Murray & William Gwynn

NYSDOT

Operating Manager, Purchasing Unit

- David Mackey

Questions & Answers

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