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IT Umbrella Manufacturer and Distributor Contracts

Case Studies in How to Procure IT Products

May 2 & 3, 2018

#2018NYGovBuy  @NYSPRO  @nysprocurement

Presenters

- Jessica LaFlamme
- Jordan Marryott
- Sarah Berte
- Daniel DeCamp
- Alexis Bredencko



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

OGS Restricted Periods List:

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



Agenda

1. IT Centralized Contract Suite Overview
2. The Umbrella Manufacturer Contract
 1. Overview
 2. Contract Changes
 3. Procurement Scenarios
 4. Case Study
3. The Umbrella Distributor Contract
 1. Overview
 2. Case Study
4. Question & Answer

IT Centralized Contract Suite Overview

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IT Centralized Contract Suite Overview

- HBITS – Hourly Based IT Services (2012, 2018)
- PBITS – Project Based IT Consulting Services (2015, 2016)
- IT Manufacturer Based Umbrella (2015, 2017)
 - **Aggregate Buys**
- IT Distributor Based Umbrella (2016)





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 to use
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



IT Manufacturer Umbrella Contract

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Umbrella Manufacturer Contract Overview

1. 70 Contractors from Original Contract
 - Periodic recruitment is currently in process and new manufacturers will be added as a result
2. 390 Resellers
3. Designations
 - SBE – 115 Vendors
 - MBE – 40 Vendors
 - WBE – 62 Vendors
 - SDVOB – 14 Vendors

Umbrella Manufacturer Contract Overview

Contract Breakdown:

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

Umbrella Manufacturer Contract Changes

Improvements to First Periodic Recruitment

- 1) Added the ability to purchase Printers in Lot 2 – Hardware
- 2) Maximum project duration has increased from 36 months to 60 months
- 3) Cloud specific terms and conditions & attachments have been developed
- 4) Easier for Authorized Users to contract with M/WBE, SBE, and SDVOBs

Umbrella Manufacturer Types of RFQs

Request For Quotes (RFQ) are used to obtain pricing from contract manufacturers and their designated resellers.

- 1) **Basic** Request for Quote
 - Basic RFQ Financial Response
- 2) **Complex** Request for Quote
 - Complex RFQ Financial Response
- 3) **Cloud Solution** Request for Quote
 - Cloud RFQ Financial Response

RFQ Procurement Scenarios

1) When can an Authorized User send a RFQ to a Single Manufacturer and their Resellers?

Answer: When a Manufacturer has five (5) or more approved Resellers within an applicable Lot, the RFQ can go to the specific Manufacturer and all of its approved Resellers within the applicable Lot.

RFQ Procurement Scenarios

2) When should an Authorized User send an RFQ to all Manufacturers and Resellers in a specific Lot?

Answer: When an Authorized User's needs could be met by multiple Manufacturers, or a desired Manufacturer has less than five (5) approved Resellers within the applicable Lot.

RFQ Procurement Scenarios

3) Our agency would like to send an RFQ directly to M/WBEs, SBEs, and SDVOBs. Is this possible?

Answer: Yes. When a purchase is under \$200,000, Authorized Users can direct their RFQs to all Manufacturers/Resellers who have at least one or more of the following designations: **SBE, MBE, WBE,** and **SDVOB.**



RFQ Procurement Scenarios

4) Our agency just purchased servers under this contract. We didn't realize implementation services were needed at the time of purchase, but they are. Is it possible to do an RFQ for Implementation Services only?

Answer: Yes, provided that these Implementation Services are for products that are currently on this contract.



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
- Lot 4 – Implementation

Umbrella Manufacturer – Aggregate Buys

Aggregate Buys OGS has completed

1. RFQ 16-1: Desktop / Notebooks / Convertible Tablet / All-In-One / Displays
2. RFQ 16-2: Hosted Contact Center
3. RFQ 16-3: Enterprise Desktop

The suite of Aggregate Buys will be expanded as time allows and customer demand requires

**Information Technology Umbrella Contract – Manufacturer Based
(Statewide)
*IMPORTANT***
PLEASE (CLICK HERE) BEFORE USING THIS CONTRACT

Award Document  {Updated / Revised}	Contract Period: November 30, 2015 – November 29, 2020
Contract Updates 	Group: 73600 Award: 22802
Contractor Information 	Use of Contracts: All State Agencies & Non-State Agencies
How To Use & Template Page 	Contact Person: Sarah Berte or Jessica LaFlamme Telephone: (518) 486-5117 (518) 473-2946
Base Contract & Appendices 	Contract Issued: December 10, 2015 Contract Updated: March 02, 2018
Aggregate Buy 	
Listing of Contractors & Resellers	
Historical Details 	
Customer Service	



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



AGGREGATE BUY ----- 2016 / 2017

{ CLICK THE PARTICULAR RFQ AGGREGATE BELOW THAT CORRESPONDS TO YOUR NEED. }



2016/17 Hardware Aggregate Buy
RFQ 16-1

2016/17 Aggregate Buy
RFQ 16-2

2016/17 Aggregate Buy
RFQ 16-3

<https://www.ogs.ny.gov/purchase/snt/awardnotes/7360022802AggregateBuy.pdf>



CONFIGURATIONS(S)	CONTRACT #	CONTRACTOR	FEIN / VID #	CONTRACT SPECIFICS
 <p>Convertible Tablet</p> <p>Education/Entry Level Desktop</p> <p>Education/Entry Level Notebook</p>	PM20860	HP, Inc. 3000 Hanover Street Palo Alto, CA 94304	FED ID# 941081436 NYS Vendor ID# 1000009783	<p>Contractor Information</p> <p>Price List</p> <p>Award</p> <p>RFQ</p> <p>HP, Inc. Aggregate Buy Website</p>

https://www.ogs.ny.gov/purchase/snt/awardnotes/7360022802AggregateBuy_RFQ16-1.pdf

Contractor Name:	HP Inc.		Standard Configuration Total (Auto Fill)
Manufacturer Umbrella Contract #:	PM20860		
RFQ #	16-1		
PC Configuration:	Education Entry Level Desktop		\$493.28
Model Name :	HP ProDesk 400 G4 SFF PC		
Date of Modificaton:	7/6/2017		

Standard Configuration

Aggregate Buy Item Number	Component	Specification Requirement	Product Description from the Manufacturer Umbrella Price List	Manufacturer Part Number (SKU) from the Manufacturer Umbrella Contract Price List	Net NYS Contract Price from the Manufacturer Umbrella Contract Price List	Aggregate Buy Price
1	CPU / Chipset	Intel i5 8th Generation or better (non mobile only)	Intel Core i5-6500 3.2G 6M 2133 4C	Z5U18AV	\$322.56	\$138.00
2	RAM	8GB 1600MHz DDR3	8GB (1x8GB) DDR4-2400 NECC UNB	Y5S13AV	\$93.80	\$40.00
3	Internal Hard Drive	Lowest Cost	HDD 500GB 7200RPM SATA 3.5	Y5R63AV	\$65.52	\$32.00
4	Video	Integrated Intel 530 Graphics or better	Intel® HD Graphics 530	Included	N/A	N/A
5	Network Adapter	Integrated 100/1000 Ethernet	Realtek RTL8111HSH-CG GbE Ethernet Controller	Included	N/A	N/A

https://www.ogs.ny.gov/purchase/snt/awardnotes/7360022802RFQ16-1_HP_EducEntryDesktop.pdf



Option Category Discount for Aggregate Hardware Buy RFQ # 16-1 and RFQ # 16-3

Warranty and Services	Description: Multi-Year Warranty, Agency Specific Imaging, Asset Tagging, Disk Retention and Accidental Damage	Percent Discount	60%
Component	Description: Replacement or Additional Components to the Standard Configuration, e.g., CPU, Additional Memory and Internal Optical Drive	Percent Discount	45%
Peripheral	Description: Cables, External Optical Drive, Wireless Keyboard and Mouse and docking station and Operating Systems, which includes lowest/no cost options	Percent Discount	20%

Aggregate Buy Item Number	Option Category	Component	Product Description from the Manufacturer Umbrella Price List	Manufacturer Part Number (SKU) from the Manufacturer Umbrella Contract Price List	Net NYS Contract Price from the Manufacturer Umbrella Contract Price List	Discount Percentage	Aggregate Buy Price
1	Warranty and Services	Asset Tagging Service	HP STANDARD ASSET TAGGING SERVICE	AY111AV	\$7.50	60%	\$3.00
2	Warranty and Services	Imaging Service	AGENCY SPECIFIC INSTALLED IMAGE BASIC	N1S57AA	\$16.00	60%	\$6.40
3	Warranty and Services	Imaging Service	AGENCY SPECIFIC INSTALLED IMAGE BASIC EXT	N1S61AA	\$24.00	60%	\$9.60
4	Warranty and Services	Warranty	4Y NBD ONSITE/ DMR	UE333E	\$60.68	60%	\$24.27
5	Warranty and Services	Warranty	5Y NBD ONSITE/ DMR	UE334E	\$88.06	60%	\$35.22
6	Component	Processor	Intel Core i7-6700 3.4G 8M 2133 4C	Z5U19AV	\$489.60	45%	\$289.28

https://www.ogs.ny.gov/purchase/snt/awardnotes/7360022802RFQ16-1_HP_EducEntryDesktop.pdf



Case Study:

How to Develop and Release an RFQ Under the Umbrella
Manufacturer Contract

Case Study – Authorized User Scenario

- An Authorized User wanted to purchase IBM Curam Social Program Management Platform Authorized User Annual SW Subscription & Support Renewal, so they created a new RFQ.
- Knowing that IBM has more than five Resellers, the Authorized User knew it only needed to go out to only the Manufacturer (IBM) and their Resellers.

Full Text Search of Procurement Contracting

Enter your query below:

Search

Clear

Group and/or Award Number Search

Enter all or part of a Group and/or Award Number. The search selects results based on the beginning of a number. A search for Group Number "224" lists Group Numbers "22400" through "22499".

Group Number:

Award Number:

Search

Clear

<https://www.ogs.ny.gov/purchase/search/default.asp>

**Information Technology Umbrella Contract – Manufacturer Based
(Statewide)
*IMPORTANT***

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How To Use & Template Page 	Contact Person: Sarah Berte or Jessica LaFlamme Telephone: (518) 486-5117 (518) 473-2946
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<https://www.ogs.ny.gov/purchase/snt/awardnotes/7360022802can.htm>

Contactor Information

LOT 2	PM20860	HP, Inc. 3000 Hanover Street Palo Alto, CA 94304	FED ID# 941081436 NYS Vendor ID# 1000009783	Contact Information Price List Terms & Conditions
<i>CONTRACT PERIOD :</i> November 30, 2015 to November 29, 2020				
LOT 1	PM67306	Impulse Point 6810 New Tampa Highway Suite 400 Lakeland, FL 33815	FED ID# 651214267 NYS Vendor ID# 1100138215	Contact Information Price List Terms & Conditions
<i>CONTRACT PERIOD :</i> November 30, 2015 to November 29, 2020				
LOT 1, 4	PM67307	Information Builders, Inc. 2 Penn Plaza New York, NY 10121-2898	FED ID# 132807185 NYS Vendor ID# 1000006223	Contact Information Price List Terms & Conditions
<i>CONTRACT PERIOD :</i> November 30, 2015 to November 29, 2020				
 LOT 1, 2, 3, 4	PM20890	International Business Machines Corporation d/b/a IBM New Orchard Road Armonk, New York 10504	FED ID# 130871985 NYS Vendor ID# 1000001053	Contact Information Price List Terms & Conditions
<i>CONTRACT PERIOD :</i> November 30, 2015 to November 29, 2020				



<https://www.ogs.ny.gov/purchase/snt/awardnotes/7360022802ContractorPage.pdf>





IBM's Lot 1 – Software Price Page

Item Numbr	Product Name	Product Description	Product Category	Manufacturer Part Number (SKU)	Bundled Part Number? Yes / No	Unit of Measure	Units Per Unit of Measur	List Pri	Minimum NYS Discour	Optional Actual NYS Discour	Net NYS Contract Price	Optional Percent Educational Discour
1	Business Analytics - Category 2	IBM Tax Audit and Compliance System Annual Update Subscription	Busin		No	Each	1	\$ 97,125.00	20.00%	20.00%	\$ 77,700.00	
2	Business Analytics Accelerated Value Learning Program - Category 2	12 Month Training Unit for Business Analytics Software for up to 5 Named Contacts	Busin		No	Each (12 Month Expiration [or less] from Date of Purchase and must be ordered to co-term with AVP from Lot 4)	1	\$ 15,625.00	20.00%	20.00%	\$ 12,500.00	
3	Business Analytics Accelerated Value Learning Program - Category 2	6 Month Training Unit for Business Analytics Software for up to 5 Named Contacts	Busin		No	Each (6 Month Expiration [or less] from Date of Purchase and must be ordered to co-term with AVP from Lot 4)	1	\$ 10,000.00	20.00%	20.00%	\$ 8,000.00	
4	Information Management Accelerated Value Learning Program - Category 2	12 Month Training Unit for Information Management Software for up to 5 Named Contacts	Inform		No	Each (12 Month Expiration [or less] from Date of Purchase and must be ordered to co-term with AVP from Lot 4)	1	\$ 15,625.00	20.00%	20.00%	\$ 12,500.00	
5	Information Management Accelerated Value Learning	6 Month Training Unit for Information Management	Inform		No	Each (6 Month Expiration [or less]	1	\$ 10,000.00	20.00%	20.00%	\$ 8,000.00	

Agencies Note: Some Products/services in this Contract may be available from one or more Preferred Sources which meet your form, function and utility. Agencies are reminded to comply with the statutory requirements under §162 of the State Finance Law and the guidelines issued by the State Procurement Council to afford first priority to Products/services available from Preferred Sources which meet your form, function and utility.

Microsoft Excel ribbon showing: Clipboard (Cut, Copy, Paste, Format Painter), Font (Arial, 9, Bold, Italic, Underline, Text Color, Background Color), Alignment (Wrap Text, Merge & Center), Number (General, Percent 2, Currency, Accounting, Date, Time, Text, Fraction, Decimals), Styles (Normal 4 3, Normal 5, Percent 2, Normal), Cells (Insert, Delete, Format), Editing (AutoSum, Fill, Sort & Find & Filter, Clear).

G2												
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1	Vendor Name	IBM Corporation		31226								
2	Contract Number	PM20890										
3	Date	3/6/2018										

Product Category dropdown menu open showing filters: Sort A to Z, Sort Z to A, Sort by Color, Clear Filter From "Manufacturer Part...", Filter by Color, Text Filters, Search (6949_215_6799, AVLPAnalytics_BA12MOS, AVLPAnalytics_BA6MOS, AVLPAnalytics_IM12MOS, AVLPAnalytics_IM6MOS, AVLPAnalytics_IS12MOS, AVLPAnalytics_IS6MOS, AVLPWebSphere_T112MOS, AVLPWebSphere_T16MOS). Buttons: OK, Cancel.

IBM's Lot 1 – Software Price Page - Item

D	E	F	G	H	I	J	K	L	M
IBM Corporation		31226							
PM20890									
3/6/2018									

Agencies Note: Some Products/services in this Contract may be available from or Agencies are reminded to comply with the statutory requirements under §162 of the guidelines issued by the State Procurement Council to afford first priority to Product Preferred Sources which meet your form, function and utility.

Product Description	Product Category	Manufacturer Part Number (SKU)	Bundled Part Number? Yes / No	Unit of Measure	Units Per Unit of Measure	List Price	Minimum NYS Discount	Optional Actual NYS Discount	Net NYS Contract Price
IBM Curam Social Program Management Platform Authorized User Annual SW Subscription & Support Renewal	Industry Solutions - Category 2	E0E75LL	No	Each	1	\$ 2,040.00	20.00%	30.00%	\$ 1,428.00

**Information Technology Umbrella Contract – Manufacturer Based
(Statewide)
*IMPORTANT***
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Aggregate Buy 	
Listing of Contractors & Resellers	
Historical Details 	
Customer Service	

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



How to Use the Umbrella Manufacturer Contract and RFQ Templates

HOW TO USE		
How To Use This Contract	 (10/16)	 (01/18)
AUTHORIZED USER TEMPLATES		
Basic Request For Quote	 (12/15)	 (01/18)
Complex Request For Quote	 (12/15)	 (01/18)
Basic RFQ Financial Response	 (12/15)	 (01/18)
Complex RFQ Financial Response	 (12/15)	 (01/18)
RFQ Participation Interest	 (12/15)	 (12/15)
CLOUD SOLUTION		
How To Use This Contract		 (01/18)
RFQ		 (01/18)
RFQ – Financial Response		 (01/18)
RFQ Checklist		 (01/18)



<https://www.ogs.ny.gov/purchase/snt/awardnotes/7360022802TemplatePageCombo.pdf>



Appendix G. b. – How to Use the Manufacturer Umbrella Contract – Examples of Procurement Scenarios (Page 2).

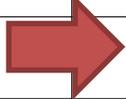
1.3 RFQ INVOLVING A SINGLE MANUFACTURER

Authorized Users should use this scenario when only a single Manufacturer can satisfy their needs. **This scenario may only be used when the Manufacturer has identified five (5) or more Resellers within the applicable Lot.**

For example, an Authorized User needs to procure 5 routers from a specific Manufacturer. The Authorized User will solicit quotes from the single Manufacturer and all of its Resellers within Lot 2 to get the lowest price for these devices.

RFQ Involving a Single Manufacturer Without Implementation	
Lots Involved	Lot 1 – Software, Lot 2 – Hardware
Minimum Requirements	Authorized User may include any of the following: <ul style="list-style-type: none"> • Pre-defined product description, SKUs and quantity • Pre-packaged Installation and Maintenance
Templates to Use	<ul style="list-style-type: none"> • Basic RFQ • Basic RFQ Financial Response
Contractor Pool for Procurement	Manufacturer and all of its approved Resellers of each Product Lot
Basis for Award (Select Only One)	<ul style="list-style-type: none"> • Lowest Price Meeting Specified Technical Requirements; OR • Lowest Price Meeting Specified Technical Requirements and Mandatory Pass/Fail Requirements

How to Use the Umbrella Manufacturer Contract and RFQ Templates

HOW TO USE		
How To Use This Contract	 (10/16)	 (01/18)
AUTHORIZED USER TEMPLATES		
Basic Request For Quote	 (12/15) 	 (01/18)
Complex Request For Quote	 (12/15)	 (01/18)
Basic RFQ Financial Response	 (12/15) 	 (01/18)
Complex RFQ Financial Response	 (12/15)	 (01/18)
RFQ Participation Interest	 (12/15)	 (12/15)
CLOUD SOLUTION		
How To Use This Contract		 (01/18)
RFQ		 (01/18)
RFQ – Financial Response		 (01/18)
RFQ Checklist		 (01/18)



Cover Page - Basic Request for Quote

TO BE COMPLETED BY AUTHORIZED USER

RFQ Title **IBM Software - Curam Social Program Management Platform Authorized User Annual SW Subscription & Support Renewal – April 2, 2018** RFQ Number **12345AB**

Authorized User Information:

Bert and Ernie
123 Sesame Street
Albany, NY 12345

Authorized User Delivery Information:

Bert and Ernie
123 Sesame Street
Albany, NY 12345

Special Delivery Instructions: **Deliveries will need to be staggered over a twelve-month period. Please see Section B, Authorized Users Terms and Conditions for more details.**

DESIGNATED CONTACTS

Name(s)	E-Mail(s)
Bert and Ernie	Bert&Ernie@sesamestreet.ny.gov

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.ogs.ny.gov/aboutOgs/regulations/defaultAdvisoryCouncil.html>



Umbrella Manufacturer Cover Page – Basic Request for Quote

QUESTIONS AND OTHER EVENTS

This RFQ is for Products from the following checked Lots as defined in Award # 22802 – Information Technology Umbrella Contract – Manufacturer Based (Statewide):

Lot 1 – Software Lot 2 – Hardware Lot 4 – Implementation

The Authorized User named above is seeking competitive quotes from the Contractor (Manufacturer) and their Resellers (where applicable) of Information Technology Umbrella Contract – Manufacturer Based Contract(s) for the above-referenced Products. If the RFQ includes Lot 4 – Implementation, Contractor must prior to submitting a response to the RFQ either hold an award for Lot 4- Implementation, or be able to provide the services under the other Lots included in the RFQ.

Event	Date	Time
RFQ Release Date	April 2, 2018	N/A
Question Due Date	April 6, 2018	12:00 PM EST
Response to Questions Date	April 10, 2018	5:00 PM EST
Vendor Response Due Date	April 17, 2018	11:00 AM EST

IS THE RFQ BIDDER POOL LIMITED TO M/WBE, SB, AND SDVOB VENDORS: Yes No

BASIS FOR AWARD Lowest Price Meeting Specified Technical Requirements
 Lowest Price Meeting Specified Technical Requirements and Mandatory Pass/Fail Requirements

E-RATE ELIGIBLE: Yes (E-Rate Discounts are Required) No

ATTACHMENTS

- Basic RFQ Financial Response (Excel)

The Authorized User will not be held liable for any cost incurred by the Contractor for work performed in the preparation of a response to this RFQ or for any work performed prior to the formal execution of an Authorized User Agreement. Responses to the RFQ must be received by the deadline specified above. Contractors assume all risks for timely, properly submitted deliveries. A Contractor is strongly encouraged to arrange for delivery of RFQ responses prior to the date of the RFQ opening. LATE RFQ responses may be rejected. The received time of a RFQ response will be determined by the Authorized User.

All purchases resulting from this RFQ shall be in accordance with terms and conditions of the OGS Information Technology Umbrella Contract – Manufacturer Based Contract(s) and any additional terms and conditions set forth in this RFQ and its Attachments.



Umbrella Manufacturer Cover Page – Basic Request for Quote

A. SCOPE/MANDATORY REQUIREMENTS

This RFQ is being distributed to the Contractor and Resellers (IBM and their Umbrella Manufacturer Contract approved Lot 1 – Software resellers) to acquire the following:

Mandatory Technical Requirements:

- Sesame Street requires a total of 7,615 IBM Curam Social Program Management Platform Authorized User Annual SW Subscription & Support Renewal – SKU # E0E75LL.

Mandatory Pass/Fail Requirements:

- Bids will only be accepted from the Manufacturer International Business Machines Corporation d/b/a IBM and their approved Lot 1 – Software resellers under the Umbrella Manufacturer Contract.
- Must agree to meet the “Authorized User Terms and Conditions” found below.

Umbrella Manufacturer Cover Page – Basic Request for Quote

B. AUTHORIZED USER TERMS AND CONDITIONS

Sesame Street requires the delivery be made in two parts:

- In the first delivery, Sesame Street requires 1,000 IBM Curam Social Program Management Platform Authorized User Annual SW Subscription & Support Renewal to be provided on or before May 14th.
- In the second delivery, Sesame Street requires the other 6,615 IBM Curam Social Program Management Platform Authorized User Annual SW Subscription & Support Renewal to be provided on or before September 17th.

As stated above, Sesame Street intends on taking two deliveries of this product. However, Sesame Street may purchase some, all or more of the quantities of the software listed above.

Additionally, Sesame Street reserves the right to make additional purchases beyond the September 17th date and therefore requires the winning vendor to hold their discount given for 12 months from the date of award.

Finally, Sesame Street reserves the right to:

- Withdraw the RFQ at any time, in whole or in part, at the sole discretion of Sesame Street.
- Make an award under the RFQ in whole or in part.
- Disqualify any Vendor whose conduct and/or Vendor Submission fails to conform to the requirements of the RFQ.
- Seek clarifications and revisions of the RFQ response.
- Not purchase any products from the resulting RFQ submission.

Umbrella Manufacturer Cover Page – Basic Request for Quote

C. AUTHORIZED USER INFORMAL DISPUTE RESOLUTION PROCESS

Should a protest be submitted by a Contractor regarding this RFQ, the protest will be considered and decided by the Authorized User.

[THE LANGUAGE BELOW IS AN EXAMPLE OF LANGUAGE THAT COULD BE USED IF AN AUTHORIZED USER DOES NOT HAVE A DISPUTE RESOLUTION POLICY]

Umbrella Manufacturer Contract – Basic RFQ Financial Response Form

BASIC RFQ FINANCIAL RESPONSE

 RFQ Number 12345AB	 Authorized User Name Sesame Street State Agency	Contract Number	Manufacturer / Reseller Name	Date Completed	RFQ Total
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Please See Request for Quotes for all Authorized User requirements.

Lot this RFQ Applies to:

Lot 1 Software Lot 2 Hardware Lot 4 Implementation

If the RFQ includes Lot 4 – Implementation, Contractor must prior to submitting a response to the RFQ either hold an award for Lot 4- Implementation, or be able to provide the services under the other Lots included in the RFQ.

Instructions for When SKU's Have Been Identified by Authorized User

Authorized User will complete RFQ Number, Authorized User Name, Lot Number, Product Description, Manufacturer Part Number (SKU), Net NYS Contract Price and Qty.
Manufacturer / Reseller will complete Additional Product Discount %, and optional Additional Discount \$\$.

Instructions for When Authorized User Requires Vendor to Provide Suggested SKU's

Authorized User will complete RFQ Number and Authorized User Name.
Manufacturer / Reseller will complete Lot Number, Product Description, Manufacturer Part Number (SKU), Net NYS Contract Price, Additional Product Discount %, Qty and optional Additional Discount \$\$ to meet a defined need as detailed in the Authorized User Request for Quote. **RESPONSES ARE BINDING AND NON-RETRACTABLE.**

RFQ Item Number	Lot Number	Product Description	Manufacturer Part Number (SKU)	Net NYS Contract Price	Additional Product Discount %	RFQ Product Price	Qty	Optional Additional Discount \$\$	Extended RFQ Price
1	1	IBM Curam Social Program Management Platform Authorized User Annual SW Subscription & Support Renewal	E0E75LL	\$1,428.00		\$1,428.00	7615.00		\$10,874,220.00
2									
3									



Information Technology Umbrella Contract – Manufacturer Based (Statewide)

IMPORTANT

PLEASE (CLICK HERE) BEFORE USING THIS CONTRACT

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Customer Service	



<https://www.ogs.ny.gov/purchase/snt/awardnotes/7360022802TemplatePageCombo.pdf>





Umbrella Manufacturer – Listing of Contractors and Resellers

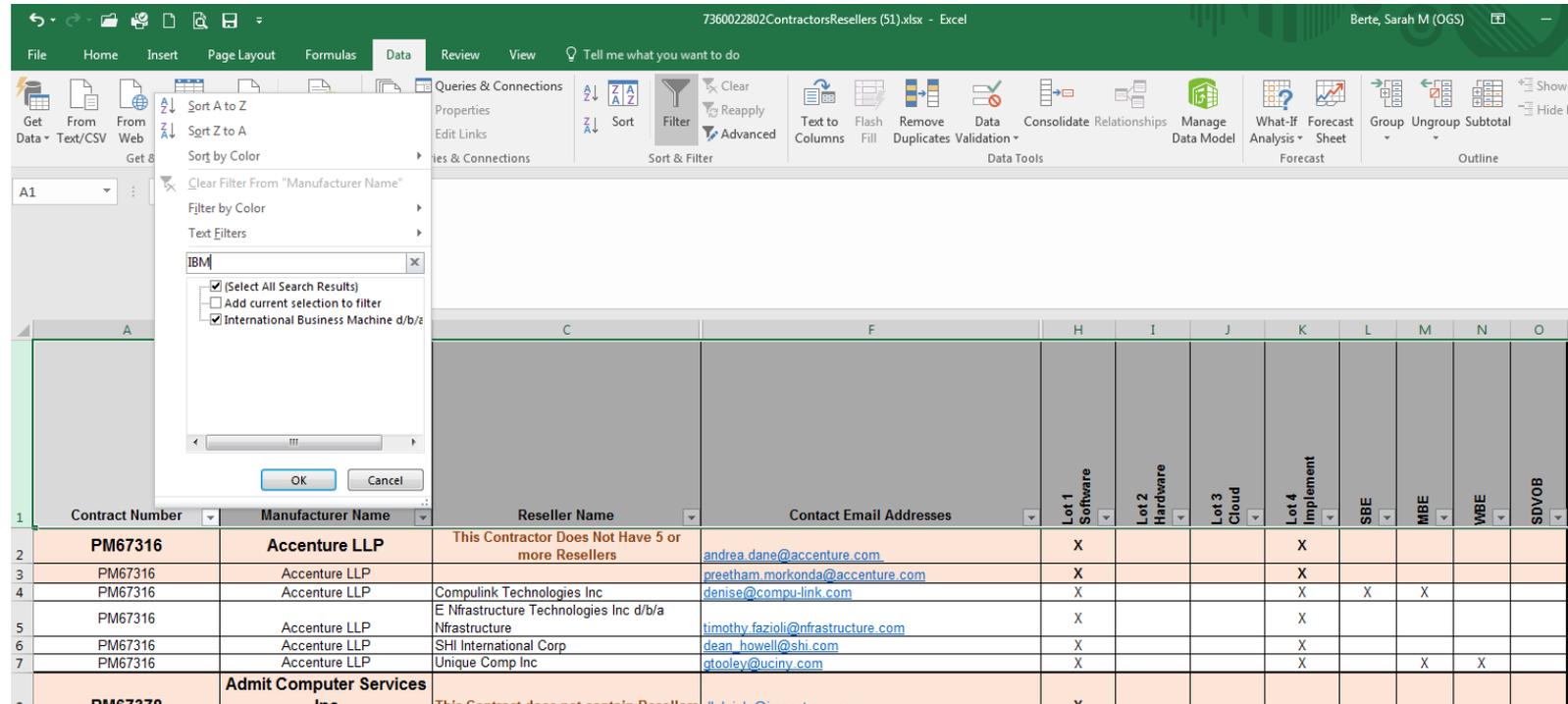
7360022802ContractorsResellers (48).xlsx - Excel

Berte, Sarah M (OGS)

Contract Number	Manufacturer Name	Reseller Name	Contact Email Addresses	Lot 1 Software	Lot 2 Hardware	Lot 3 Cloud	Lot 4 Implement	SBE	MBE
PM67316	Accenture LLP	This Contractor Does Not Have 5 or more Resellers	andrea.dane@accenture.com	X			X		
PM67316	Accenture LLP		preetham.morkonda@accenture.com	X			X		
PM67316	Accenture LLP	Compulink Technologies Inc	denise@compu-link.com	X			X	X	X
PM67316		E Nfrastructure Technologies Inc d/b/a		X			X		



Umbrella Manufacturer – Listing of Contractors and Resellers How to Search



The screenshot shows an Excel spreadsheet with the following data:

Contract Number	Manufacturer Name	Reseller Name	Contact Email Addresses	Lot 1 Software	Lot 2 Hardware	Lot 3 Cloud	Lot 4 Implement	SBE	MBE	WBE	SDVOB
PM67316	Accenture LLP	This Contractor Does Not Have 5 or more Resellers	andrea_dane@accenture.com	X			X				
PM67316	Accenture LLP		preetham.morkonda@accenture.com	X			X				
PM67316	Accenture LLP	Complink Technologies Inc	denise@compu-link.com	X			X	X	X		
PM67316	Accenture LLP	E Nfrastructure Technologies Inc d/b/a Nfrastructure	timothy_fazioli@nfrastructure.com	X			X				
PM67316	Accenture LLP	SHI International Corp	dean_howell@shi.com	X			X				
PM67316	Accenture LLP	Unique Comp Inc	gtooley@ucincy.com	X			X		X	X	
PM67316	Admit Computer Services Inc	This Contract does not contain Resellers	dshicks@admit.com								

Umbrella Manufacturer – Listing of Contractors and Resellers

IBM Located

A Contract Number	B Manufacturer Name	C Reseller Name	F Contact Email Addresses	H Lot 1 Software	I Lot 2 Hardware	J Lot 3 Cloud	K Lot 4 Implement	L SBE	M MBE
PM20890	International Business Machine d/b/a IBM		ciccio@us.ibm.com	X	X	X	X		
PM20890	International Business Machine d/b/a IBM		smclemente@us.ibm.com	X	X	X	X		
PM20890	International Business Machine d/b/a IBM		tgillingham@us.ibm.com	X	X	X	X		
PM20890	International Business Machine d/b/a IBM		beckettm@us.ibm.com	X	X	X	X		
PM20890	International Business Machine d/b/a IBM		eefrey@us.ibm.com	X	X	X	X		
PM20890	International Business Machine d/b/a IBM	Accenture LLP	nakia.d.leggett@accenture.com	X	X	X	X		
PM20890	International Business Machine d/b/a IBM	Accenture LLP	mayxee.xiong@accenture.com	X	X	X	X		
PM20890	International Business Machine d/b/a IBM	E Nfrastructure Technologies Inc d/b/a Nfrastructure	Brittany.Lee@nrastructure.com	X	X	X	X		
PM20890	International Business Machine d/b/a IBM	E Nfrastructure Technologies Inc d/b/a Nfrastructure	alexander.grover@nrastructure.com	X	X	X	X		



Selecting Contractor Pool for Procurement

File Home Insert Page Layout Formulas Data Review View Tell me what you want to do						
Get & Transform Data		Sort & Filter		Data Tools		
Contact Email Addresses						
	A	B	C	F	H	I
	Contract Number	Manufacturer Name	Reseller Name	Contact Email Addresses	Lot 1 Software	Lot 2 Hardware
1	PM20890	International Business Machine d/b/a IBM		criccio@us.ibm.com	X	X
582	PM20890	International Business Machine d/b/a IBM		smclemente@us.ibm.com	X	X
583	PM20890	International Business Machine d/b/a IBM		tgillingham@us.ibm.com	X	X
584	PM20890	International Business Machine d/b/a IBM		beckettm@us.ibm.com	X	X
585	PM20890	International Business Machine d/b/a IBM		efrey@us.ibm.com	X	X
586	PM20890	International Business Machine d/b/a IBM	Accenture LLP	nakia_d_leggett@accenture.com	X	X
587	PM20890	International Business Machine d/b/a IBM	Accenture LLP	mayxee.xiong@accenture.com	X	X
588	PM20890	International Business Machine d/b/a IBM	E Nfrastructure Technologies Inc d/b/a Nfrastructure	Brittany.Lee@nfrastucture.com	X	X
589	PM20890	International Business Machine d/b/a IBM	E Nfrastructure Technologies Inc d/b/a Nfrastructure	alexander.grayson@nfrastucture.com	X	X
590	PM20890	International Business Machine d/b/a IBM	Essex Technology Group Inc	Charlie.lucas@essextec.com	X	X
591	PM20890	International Business Machine d/b/a IBM				





RFQ Notification to Designated Contractor Pool

Sesame Street RFQ - Umbrella Manufacturer Contract Award 22802 - IBM Lot 1 Software - Message (HTML)

File Message Insert Options Format Text Review Tell me what you want to do

Cut Copy Paste Format Painter Clipboard Basic Text Names Include Tags Add-ins

This email message will be sent to about 38 recipients.

From: Sarah.Berte@ogs.ny.gov

To: criccio@us.ibm.com; smdemente@us.ibm.com; tallingham@us.ibm.com; beckett@us.ibm.com; eefrey@us.ibm.com; nalia.d.leggett@accenture.com; mayxee.xiong@accenture.com; Brittany.Lee@mfastructure.com; alexander.arayson@mfastructure.com; Charlie.Lucas@essextec.com; dlufig@essextec.com; drisc@esystems-inc.com; Bill_micculli@redmane.com; jcallisto@qhsystems.com; mbudzich@qemko.com; gpp@ironsidegroup.com; shansbury@ironsidegroup.com; amormley@lighthousecs.com; qberard@lighthousecs.com; nybids@ipa.com; rob.butler@mainline.com; catie.cooper@mainline.com; rscardelli@microstrat.com

Cc:

Subject: Sesame Street RFQ - Umbrella Manufacturer Contract Award 22802 - IBM Lot 1 Software

Attached: 7360022802 IBM BasicRFQ_PRB01.docx (82 KB); 7360022802 - IBM Lot 1 Software - BasicRFQFinancial.xlsx (36 KB)

Use Adobe Send & Track Yes No

Dear Vendor,

This is a request for quotes (RFQ) of the NYS Umbrella Manufacturer Contract.

Sesame Street State Agency is looking to procure 7,615 IBM Curam Social Program Management Platform Authorized User Annual SW Subscription & Support Renewal.

Please see the attached forms and return the response including your companies Basic Financial Response no later than 11:00AM EST Tuesday, April 17th, 2018.

Thank you.

Bert and Ernie
Sesame Street State Agency



Umbrella Manufacturer – Authorized User Responsibilities

1) Evaluation of Quotes

- Quotes must be evaluated according to the methodology pre-defined in the RFQ
- Verify products for ROP

2) Required No-Bid Canvass

- Only 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 via e-mail

IT Umbrella Distributor

#2018NYGovBuy  @NYSPro  @nysprocurement



NY GovBuy

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** – Makes 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.
- This contract allows Authorized Users to solicit quotes for products from any IT related Software or Hardware Manufacturer who doesn't have another OGS Software or Hardware contract.

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





Umbrella Distributor Overview

Question: Can I buy this product on the Umbrella Distributor contract?

Answer: You can buy it on the Distributor contract if:

- The product is non-cloud Software or Hardware
- The Manufacturer is not listed on the Prohibited List

Umbrella Distributor Overview

- 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 Price Lists

APPENDIX H - CONTRACT RATES			
Group 73600 - Award 22876			
Information Technology Umbrella Contract			
Distributor Based Software and Hardware (Statewide)			
CONTRACTOR NAME:	Dell Marketing L.P. D/B/A Dell Technologies / Dell		
FEDERAL ID:	74-2616805		
NYS VENDOR ID:	1000041162		
CONTRACT NUMBER:	PD67644		
LAST UPDATED:	3/27/2018		
Manufacturers Not Listed by Name Below:			
If a Manufacturer is not listed by name below in Category 1, an Authorized User can still solicit quotes for the Manufacturer's Products under Category 2 - "Other Manufacturers" below			
LOT 1 - SOFTWARE		LOT 2 - HARDWARE	
Category 1		Category 1	
Any Cost-Minus Percentage will be preceded by a minus sign (-)		Any Cost-Minus Percentage will be preceded by a minus sign (-)	
Manufacturer	Cost-Plus or Cost-Minus Percentage	Manufacturer	Cost-Plus or Cost-Minus Percentage
ADOBE SYSTEMS INC.	0.75%	3M COMPANY	3.00%
ATTACHMATE	0.55%	ALCATEL-LUCENT USA INC	3.00%





Umbrella Distributor Price Lists



Manufacturers Not Listed by Name Below:

If a Manufacturer is not listed by name below in Category 1, an Authorized User can still solicit quotes for the Manufacturer's Products under Category 2 - "Other Manufacturers" below

LOT 1 - SOFTWARE		LOT 2 - HARDWARE	
Category 1		Category 1	
Any Cost-Minus Percentage will be preceded by a minus sign (-)		Any Cost-Minus Percentage will be preceded by a minus sign (-)	
Manufacturer	Cost-Plus or Cost-Minus Percentage	Manufacturer	Cost-Plus or Cost-Minus Percentage
ADOBE SYSTEMS INC.	0.75%	3M COMPANY	3.00%
ATTACHMATE	0.55%	ALCATEL-LUCENT USA INC	3.00%
AUTODESK	0.55%	BLACKBOX NETWORK SERVICES (Nu-Vision)	3.00%

Umbrella Distributor Price Lists

SYMANTEC-VERISIGN	0.75%	WINCHESTER SYSTEMS INC	3.00%
ZSCALER, INC.	0.25%	ZETRON, INC.	3.00%
Category 2		Category 2	
OTHER MANUFACTURERS*	3.00%	OTHER MANUFACTURERS*	6.00%

Contractors may offer better **Cost-Plus/Cost-Minus percentages at the time of a Request for Quote**

***Please Note: This contract prohibits the sale and purchase of the following Products:**
Lot 1: Products of a Manufacturer that holds an OGS Contract for the sale of Software
Lot 2: Products of a Manufacturer that holds an OGS Contract for the sale of Hardware



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
- **Authorized Users can require Contractors to supply a copy of the Manufacturer's quote**
 - Language stating this requirement should be added to the RFQ. This language is already in the Distributor RFQ template



Umbrella Distributor Case Study

- An Authorized User was looking to purchase iPads and related accessories
- They did not know exactly how many they would need over the next 6 months, but didn't want to do an RFQ every time they needed to make a purchase

Umbrella Distributor Case Study

Category 1	
Any Cost-Minus Percentage will be preceded by a minus sign (-)	
Manufacturer	Cost-Plus or Cost-Minus Percentage
3M COMPANY	3.00%
ALCATEL-LUCENT USA INC	3.00%
BLACKBOX NETWORK SERVICES (Nu-Vision)	3.00%
CANON SOLUTIONS AMERICA INC	5.70%
COMPUTECH INTERNATIONAL INC (CTI)	3.00%
FIBERDYNE LABS INC	3.00%
HOEFLER COMMUNICATIONS	3.00%
McAFEE	3.00%
NORTHPOINT DOMAIN INC	3.00%
OLYMPUS AMERICA INC	3.00%
OPEX CORPORATION	3.00%
PASCO SCIENTIFIC	3.00%
PHILIPS ELECTRONICS NORTH AMERICA INC	3.00%
PRESSTEK INC	3.00%
RMG ENTERPRISE SOLUTIONS INC	3.00%
RUDOLPH TECHNOLOGIES INC	3.00%
SIEMENS INDUSTRY INC	3.00%
SYSTEMS ENGINEERING TECHNOLOGY CORP	3.00%
WINCHESTER SYSTEMS INC	3.00%
ZETRON, INC.	3.00%
Category 2	
OTHER MANUFACTURERS*	6.00%



- Apple isn't listed by name on the Lot 2 - Hardware Price List
- The Authorized User could still solicit quotes for Apple products, because:
 - 1) Apple isn't on the Lot 2 Prohibited List
 - 2) The Product isn't Cloud
- Apple would fall under Category 2 – Other Manufacturers

Office of General Services
Procurement Services

Group 73600 – Award 22876
Information Technology Umbrella Contracts - Distributor Based (Statewide)
Request for Quote Template

Page 2 of 4

Cover Page - Request for Quote

TO BE COMPLETED BY AUTHORIZED USER

RFQ Title Apple iPads and Accessories

RFQ Number 2017-123

Authorized User Information:

NYS Agency
Empire State Plaza
Albany, NY, 12242

Authorized User Delivery Information

NYS Agency
Empire State Plaza
Albany, NY, 12242

Special Delivery Instructions:



DESIGNATED CONTACTS	
Name(s)	E-Mail(s)
Fred Rogers	MrRogers@agency.ny.gov
<p>Authorized User shall indicate if Procurement Lobbying Law/Restricted Period is in effect: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><i>Executive State agencies and certain other entities are required to comply with Procurement Lobbying Law which requires the inclusion of a Restricted Period in procurements. If an Authorized User is not certain whether or not they are required to include a Restricted Period, please use the below link for additional information resources. 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.</i></p> <p>Information may be accessed at: Procurement Lobbying: http://www.ogs.ny.gov/aboutOgs/regulations/defaultAdvisoryCouncil.html</p>	

KEY EVENTS/ DATES

The Authorized User named above is seeking competitive Quotes from the Contractors (where applicable) of Information Technology Umbrella Contract – Distributor Based Software and Hardware Contract(s). This RFQ is for Products from the following checked Lot(s) as defined in Award # 22876 – Information Technology Umbrella Contract – Distributor Based Software and Hardware (Statewide):

Lot 1 – Software Lot 2 – Hardware

Event	Date	Time
RFQ Release Date	9/7/17	N/A
Vendor Response Due Date	9/15/17	5:00PM EST



E-RATE ELIGIBLE: Yes (E-Rate Discounts are Required) No

ATTACHMENTS • Attachment 1 - Financial (RFQ Financial Response (Excel))

Office of General Services
Procurement Services

Group 73600 – Award 22876
Information Technology Umbrella Contracts - Distributor Based (Statewide)
Request for Quote Template

A. SCOPE/MANDATORY REQUIREMENTS

This RFQ is being distributed to all Contractors to acquire the following:

- iPad Pro 10.5-Inch 64GB (Wi-Fi Only), Silver
- AppleCare+ for iPad
- Case for the 10.5-inch iPad Pro. The case must be a folio case with a keyboard.



B. AUTHORIZED USER TERMS AND CONDITIONS

Agency will purchase some, all, more, or none of the quantities of the products and services detailed in the Financial Response (see Excel spreadsheet) over a six (6) month period from date of award, but not necessarily at one time. The Agency requires that the prices be held for six (6) months from the date of award.



Financial Template

RFQ Number	Authorized User Name	Contract Number	Contractor Name	Date Completed
2017-123	NYS Agency			

Please See Request for Quotes for all Authorized User requirements.

Lot this RFQ Applies to:

Lot 1 Software

Lot 2 Hardware

Instructions for When SKU's Have Been Identified by Authorized User

Authorized User will complete RFQ Number, Authorized User Name, Lot Number, Product Description, Manufacturer Part Number (SKU), and Qty.

Contractor will complete Contract Number, Contractor Name, Date Completed, Product Cost to Contractor, Contractor's Not-to-Exceed Cost-Plus/Cost-Minus Percentage and Actual Cost-Plus/Cost-Minus Percentage

Instructions for When Authorized User Requires Contractor to Provide Suggested SKU's

Authorized User will complete RFQ Number and Authorized User Name.

Contractor will complete Contract Number, Contractor Name, Date Completed, Lot Number, Product Description, Manufacturer Part Number (SKU), Qty, Product Cost to Contractor, Contractor's Not-to-Exceed Cost-Plus/Cost-Minus Percentage and Actual Cost-Plus/Cost-Minus Percentage to meet a defined need as detailed in the Authorized User Request for Quote.

RFQ Item Number	Lot Number	Product Description	Manufacturer Part Number (SKU)	Qty	Product Cost to Contractor	Contractor's Not-to-Exceed Cost-Plus/Cost-Minus Percentage	Actual Cost-Plus/Cost-Minus Percentage	RFQ Product Price	Extended RFQ Price
1	Lot 2	iPad Pro 10.5-Inch 64GB (Wi-Fi Only) - Silver	MQDW2LL/A	15					
2	Lot 2	AppleCare+ for iPad	S4738LL/A	15					
3									



RFQ Item Number	Lot Number	Product Description	Manufacturer Part Number (SKU)	Qty
1	Lot 2	iPad Pro 10.5-Inch 64GB (Wi-Fi Only) - Silver	MQDW2LL/A	15
2	Lot 2	AppleCare+ for iPad	S4738LL/A	15
3				





Product Cost to Contractor	Contractor's Not-to-Exceed Cost-Plus/Cost-Minus Percentage	Actual Cost-Plus/Cost-Minus Percentage	RFQ Product Price	Extended RFQ Price



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

Questions?

#2018NYGovBuy  @NYSPRO  @nysprocurement



NY GovBuy