



**Office of  
General Services**

# IT Umbrella Manufacturer-Based Periodic Recruitment 2 (PR2)

## Pre-Bid Conference

Please ensure that your **company name** is included with your Webex attendee information.

- If it is not, please right-click your attendee information to add your company name.

**All lines have been muted upon entry to the webinar.**

**Technical difficulties? Contact [SST\\_Technology@ogs.ny.gov](mailto:SST_Technology@ogs.ny.gov).**

June 29, 2021



**Office of  
General Services**

# **IT Umbrella Manufacturer-Based Periodic Recruitment 2 (PR2)**

## **Pre-Bid Conference**

**June 29, 2021**

# Presenters

- Christine Swoboda, Contract Management Specialist 1
- Josh Sack, Contract Management Specialist 1
- Alexis Bredencko, Contract Management Specialist 2

# Restricted Period Currently In Effect

## Designated Contact Email

Manufacturer Based IT Umbrella:

[OGS.sm.SSTTechnology@ogs.ny.gov](mailto:OGS.sm.SSTTechnology@ogs.ny.gov)

OGS Restricted Periods List:

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

(NOTE: You may need to copy the URL and paste it into your web browser's address bar to get the list to display properly.)

## What is a restricted period?

This is the time beginning with the release of a solicitation and ending after the final contract is awarded.

During this time, make sure to direct your questions to the designated contacts.



# Questions

- Questions during this presentation **only** can be sent by email to [SST\\_Technology@ogs.ny.gov](mailto:SST_Technology@ogs.ny.gov)
- OGS will review and respond to applicable questions that do not violate the restricted period at the end of this presentation
- All verbal answers are subject to change - all final answers will be in writing in the official question and answer (Q&A) document
- All questions after this presentation must use Attachment 6 – Inquiry Template
- Questions submitted during this presentation will be incorporated into the standard Q&A process

# NYS Contract Reporter

# NYS Contract Reporter

Bookmarking Opportunities:





- Be sure to select “Yes” in the pop-up bookmark confirmation dialog

1	Title:	Second Periodic Recruitment to Solicitation 22802 Information Technology Umbrella Contract Manufacturer Based (Statewide)	 View this ad
	Agency:	General Services, NYS Office of	 Share this ad
	Division:	Procurement Services	 <b>Bookmark this ad</b>
	Issue Date:	06/17/2021	 Send me notification updates on this
	Due Date:	09/29/2021	
	Location:	All NYS Counties	
	Category:	Information Technology - <i>Commodities</i>	
	Ad Type:	General	
Status:	Open		

# NYS Contract Reporter

Receive Update Notifications for an Ad:

- Be sure to select “Yes” in the pop-up confirmation dialog

1	Title:	Second Periodic Recruitment to Solicitation 22802 Information Technology Umbrella Contract Manufacturer Based (Statewide)	 View this ad
	Agency:	General Services, NYS Office of Procurement Services	 Share this ad
	Issue Date:	06/17/2021	 Bookmark this ad
	Due Date:	09/29/2021	 Send me notification updates on this
	Location:	All NYS Counties	
	Category:	Information Technology - <i>Commodities</i>	
	Ad Type:	General	
	Status:	Open	



# NYS Contract Reporter

## Update Notifications

Are you sure you want to RECEIVE update notifications for this Ad?

The contract reporter will send you email notifications of changes, such as proposal due dates, ad summary changes and document uploads.

**Contract Title:** Second Periodic Recruitment to Solicitation 22802 Information Technology Umbrella Contract Manufacturer Based (Statewide)

**Agency:** General Services, NYS Office of

**Issue Date:** 06/17/2021

**Due Date:** 09/29/2021

**Location:** All NYS Counties

**Ad Type:** General

**Primary category:** Information Technology - *Commodities*

No

Yes



# NYS Contract Reporter

Opportunities posted today **54**

Opportunities posted in the last 7 days **217**

Total available opportunities **919**

**The New York State Contract Reporter**  
NYS' official source of contracting opportunities  
Bringing business and government together

Log Out >

- Contact Us
- Help

Welcome back: **Christine Swoboda**  
Agency User

My Home | Business | **My Bookmarked Ads** > | Resources | Notices and Reports >

Search open NYSCR ads  
Enter search term

Advanced Search >

Search the Archives >

My Opportunities >

**My Bookmarked Ads** >

Open Opportunities >

Recently Closed Ads >

Bid Results/Awards >

My Opportunities **45** | Bookmarked Opportunities **5** | Open Opportunities **919**

Showing results for: **My Bookmarked Opportunities: (5)**

Open Ads | Closed Ads | Archived Ads

Sort by: Issue Date (latest first) | Display: 5

1	Title:	Second Periodic Recruitment to Solicitation 22802 Information Technology Umbrella Contract Manufacturer Based (Statewide)	View this ad
	Agency:	General Services, NYS Office of Procurement Services	Share this ad
	Issue Date:	06/17/2021	Remove bookmark
	Due Date:	09/29/2021	Send me notification updates on this
	Location:	All NYS Counties	
	Category:	Information Technology - <i>Commodities</i>	
	Ad Type:	General	

Events  
See all events >

Bulletins  
NYS COVID-19 Pandemic Small Business Recovery Grant Program >  
Announcement: New Supplier Portal >  
New! IgniteU NY PTAC >  
See all bulletins >



# Existing Contract Overview

# Scope & Competition

Lot 1 – Software

Lot 2 – Hardware

Lot 3 – Cloud Solutions

Lot 4 – Implementation Services for product in Lots 1-3

- Includes a mandatory second-tier request for quotes (RFQ)
- Each RFQ includes transaction specific requirements based on authorized user needs



# PR for Existing Contract

- This is the second periodic recruitment (PR2)
- The intention of PR2 is to expand the vendor pool and product offerings
- The existing contract currently has 125 contractors
- Existing contractors will be offered PR2 terms and conditions

The existing contract can be found at:

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



# Timeline

- **2014** – Request for information (RFI) & request for comment (RFC)
- **2015** – Original solicitation issued (70 contractors)
- **2017** – PR1 (+70 contractors - 140 in all)
  - 2019-20 – Surveys & roundtables
  - 2020 – Extensions to 2022 (125 contractors in all)
- **2021** – PR2

# Thank for your feedback!

- In 2019, OGS embarked on an effort for genuine feedback
  - Authorized user survey
  - Vendor survey
- We needed more information and open conversation
  - 6 roundtable sessions (18 hours)
- After careful review and deliberation... PR2

# New in PR2



# New in PR2 - Forms

- Page 1 of the solicitation – clarification of contact person
  - This will be the person we reach out to; they should be prepared to respond as soon as possible with complete information
- Attachment 2 – more intuitive based on your responses
- Attachment 4 – reflects updated verifiable sales requirements

# New in PR2 - Scope

- Access to data outside of the continental United States (OCONUS) allowed if authorized user agrees
- Deferred payment plans (added November 2020)
- Standalone third-party products
  - Allowed **if** integral to the operation of the bidding vendor's offered solution/item
  - Bidding vendor must still warranty every item on contract
- COMeT – New self-service portal for contractors and authorized users

# New in PR2 - Scope

- Credits are allowed
- **Lot 2** – Hardware
  - Emerging technologies, e.g. drones, added to the inclusion list
  - Managed printer services are allowed
- **Lot 3** – Cloud
  - Hardware as a service (HaaS) is allowed; however, it must include both the device and connectivity
- **Lot 4** – Implementation Services
  - Consulting services allowed; however, they must be in a deliverable format

# New in PR2 – Verifiable Sales

- Verifiable sales threshold – direct + indirect Sales can both be used
- Verifiable sales threshold for Lot 3 – Cloud is now \$200,000
  - Previously \$250,000
- International governmental sales from select countries now allowed

# Appendices & Attachments Explained

# Solicitation Structure

- This bid consists of a total of 24 files, including 1 main solicitation document, 6 appendices, and 14 attachments

## Solicitation


	Attachment 5 – Vendor Insurance Requirements
Solicitation (Tracked Changes)	Attachment 6 – Inquiries and Solicitation Deviations Template
Appendix A — Standard Clauses for NYS Contracts	Attachment 9 – Report of Contract Sales
Appendix B — General Specifications	Attachment 11 – How to Use the Manufacturer Umbrella Contract
Appendix B (Tracked Changes)	Attachment 12, Part 1 – Request for Quote
Appendix C — Contract Modification Procedures	Attachment 12, Part 2 – Request for Quote - Financial Response
Appendix D – Primary Security and Privacy Mandates	Attachment 12, Part 3 – Request for Quote – Cloud Solution
Appendix E — Federal Funding	Attachment 12, Part 4 – Authorized User Specific Riders
Attachment 1 – Price Pages	Attachment 13 – Maintenance and Warranty Service Reports Template
Attachment 2 – Administrative Information	Attachment 14 – RFQ Request for Information
Attachment 3 – Contractor and Reseller Information	SDVOB Utilization Plan
Attachment 4 – Verifiable Sales	Application for Waiver of SDVOB Participation Goal

# Solicitation Document

- Submission required for **first two pages**
- Email address required
  - To ask for and receive clarifications
  - To send the contract for final signature
- No notary required
  - Replaced with bidder certification and affirmation
  - Requires signature in **ink**



# Solicitation Document – Page 1

 <b>NEW YORK</b> STATE OF OPPORTUNITY.		<b>Office of General Services</b> <b>Procurement Services</b>	
Coming Tower, Empire State Plaza, Albany, NY 12242   <a href="https://ogs.ny.gov/procurement">https://ogs.ny.gov/procurement</a>   <a href="mailto:customer.services@ogs.ny.gov">customer.services@ogs.ny.gov</a>   518-474-6717			
<h2>Solicitation – Second Periodic Recruitment</h2>			
<b>SUBMISSIONS DUE:</b> DATE: September 29, 2021 TIME: 11:00 A.M. EST SOLICITATION NUMBER: 22802		<b>TITLE:</b> Group 73600 Information Technology Umbrella Contract - Manufacturer Based (Statewide)  <b>Classification Codes:</b> 26, 32, 43, 44, 45, 52, 60, 81, 82, 83, 84, 86	
<b>CONTRACT PERIOD:</b> Upon OGS execution to November 29, 2025			
<b>DESIGNATED CONTACTS:</b> In accordance with the Procurement Lobbying Law [State Finance Law § 139-(2)(a)], the following individuals are the Designated Contacts for this Solicitation. All questions relating to this Solicitation must be addressed to the Designated Contacts. Email Address: <a href="mailto:OGS.sm.SSTtechnology@ogs.ny.gov">OGS.sm.SSTtechnology@ogs.ny.gov</a>			
Marc Kleinhenz; Michelle St. Jock; David Gambaocorta; Jordan Marryott; Alexis Bredenko; Jordan Flores; Hannah Schmidt; Maria Lemme; Josh Sack; Christine Swoboda; Kalee Waddingham			
<b>Bidder's Federal Tax Identification Number:</b> (Do Not Use Social Security Number)		<b>NYS Vendor Identification Number:</b> (See New York State Vendor File Registration Clause)	
Legal Business Name of Company Bidding:			
D/B/A – Doing Business As (if applicable):			
Street	City	State	County Zip Code
E-mail Address:		Company Web Site:	
If applicable, place an "x" in the appropriate box(es) (check all that apply)			
<input type="checkbox"/> NYS Small Business # Employees	<input type="checkbox"/> Service Disabled Veteran Owned Business	<input type="checkbox"/> NYS Minority Owned Business	<input type="checkbox"/> NYS Women Owned Business
If applicable, place an "x" in the appropriate box(es) (check all that apply)			
<input type="checkbox"/> Manufactured Within NYS	<input type="checkbox"/> Solely Manufactured Outside NYS	<input type="checkbox"/> Partially Manufactured Outside NYS _____ %	
Lot(s) Responding to: (Check all that apply): <input type="checkbox"/> Lot 1 - Software <input type="checkbox"/> Lot 2 – Hardware <input type="checkbox"/> Lot 3 – Cloud – <input type="checkbox"/> Low Risk <input type="checkbox"/> Moderate Risk <input type="checkbox"/> High Risk <b>Vendor Must Select A Level of Cloud Risk</b> <input type="checkbox"/> Lot 4 – Implementation of Lots 1, 2 and/or 3			
If you are not providing a Vendor Submission, place an "x" in the box and return this page only. <input type="checkbox"/> WE ARE UNABLE TO RESPOND AT THIS TIME BECAUSE:			
<b>FOR PROCUREMENT SERVICES USE ONLY</b>			
LITERATURE PURC. MEMO <input type="checkbox"/>	LETTER OTHER <input type="checkbox"/>	USB FLASH DRIVE <input type="checkbox"/>	# of Binders/Packages: _____ Documented by: _____
<b>RETURN THIS PAGE AS PART OF VENDOR SUBMISSION</b>			



# Solicitation Document – Page 2

## Bidder Certification and Affirmation

Bidder certifies and affirms as follows:

1. This Bid is an irrevocable offer for 60 days from the date of submission to the New York State ("NYS") Office of General Services ("OGS"), or for such longer period as is set forth in the Solicitation.
2. The Bidder can and will provide and make available, at a minimum, the Products, deliverables and/or services as described in this Solicitation.
3. The Bidder has read and understands the provisions of this Solicitation, and all appendices, attachments, and exhibits attached thereto, including Appendix A (Standard Clauses for New York State Contracts) and Appendix B (General Specifications).
4. The information contained in this Bid is complete, true, and accurate.
5. The Bidder understands and agrees to comply with the requirements of the Procurement Lobbying Law, State Finance Law § 139-j and § 139-k, and with OGS's procedures relating to permissible contacts during a procurement as required by State Finance Law § 139-j(3) and § 139-j(6)(b). Such requirements and procedures are posted at <https://ogs.ny.gov/scpl>.

The signer affirms under penalties of perjury that he or she is duly authorized to legally bind the Bidder referenced above and that he or she signed this Bidder Certification as the legally binding act of the Bidder.

\_\_\_\_\_  
Print Full Bidder Entity Name

By: \_\_\_\_\_  
Signature of Person Authorized to  
Legally Bind the Bidder

\_\_\_\_\_  
Print Name of Signatory

\_\_\_\_\_  
Print Title of Signatory

\_\_\_\_\_  
Date



# Attachment 1 – Price Pages

- Failure to submit a viable Attachment 1 results in **DISQUALIFICATION**
- Electronic submission required of entire workbook
- Vendor must complete:
  - Vendor information tab
  - Category discount tab
  - Lot tabs that you are bidding on

# Attachment 1 – Price Pages: Vendor Info

- Say “**Yes**” to the lot on the vendor information tab to **unlock** the corresponding lot tab
  - Otherwise, the tab contents remain shaded

## Attachment 1 - Price Pages

Vendor Name	
Federal ID #	

Lot Number	Lot Description	Vendor Providing Submission? Indicate Yes or No Bid	Status of Category Discount	Total Number of Items in Price Pages
1	Software			
2	Hardware			
3	Cloud			
4	Implementation Services			

- Once a Lot (1-3) says “Yes”, Lot 4 shading is removed to allow for selection
- Yellow cells require completion
- Grey cells will fill automatically

# Attachment 1 – Price Pages: Category Discount

- On the vendor info tab, we said yes to Lots 1 and 2
  - Lot 3 is greyed out as it was not selected

Category Discount						
Vendor Name		0				
Federal ID Number		0				
Lot 1 - Software			Lot 2 - Hardware		Lot 3 - Cloud	
Item Number	Product Category	Category Discount	Product Category	Category Discount	Product Category	Category Discount
EXAMPLE	Accounting Software	25.00%	Servers	20.00%	Software as a Service	10.00%
			Category Discount Incomplete			
1	Widget Software	35.00%				
2						
3						
4						

- Lot 1 has a product category name and discount
- Lot 2 is blank and shows a red error message

# Attachment 1 – Price Pages: Lot Pages

- Here we enter the unique skus and accompanying information using the product category name and discount from the previous sheet

Item Number	Product Name	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 / Category Discount	Actual NYS Discount
Sample 1	ABC Item	This field describes the item in detail	Accounting Software	123-45	No	Each	1	\$100.00000	25.00%	
Sample 2	ZYX Item	This field describes the item in detail	Accounting Software	45-6789	No	Each	1	\$100.00000	25.00%	30.00%
1										

Net NYS Contract Price	Percent Educational Discount	Net NYS Educational Price	Tags	Line Validation	Type of Documentation	Contract or Invoice Number	SKU as found on Documentation	Net Contract or Invoice Price	Comments	Price is Reasonable
\$75.00000				Complete	NYS Contract	PC123456	123-46B	\$75.00000		Yes
\$70.00000	35.00%	\$65.00000	timekeeping	Complete	Other Governmental Contract	FS-23-4567	45-6789B	\$100.00000		Yes

- Yellow cells require input
- Pink cells are optional
- Grey cells are automated

For a complete list of fields, see the fields tab

# Attachment 2 – Administrative Information

- Entire workbook must be submitted electronically
- Vendor must complete tabs 1-6:
  - Tab 1: Vendor Information
  - Tab 2: Vendor Agreements
  - Tab 3: General Questions
  - Tab 4: NYS Required Certifications *(must be printed & signed)*
  - Tab 5: Encouraging Use of NYS Businesses
  - Tab 6: FOIL Redaction



# Attachment 2 – Administrative Information

- If vendor is anticipating a merger or acquisition:
  - Submit bids in both names
  - Fill out questions on the bottom of Tab 1: Vendor Information

Is your company going through a merger / change of ownership / name change?	
If yes, please provide any relevant details such as new entity name, timeframe, etc.	

- Note: All requirements must be satisfied in the bidding entity's name through complete execution of contract


# Attachment 2 – Administrative Information

- Use checklist at end (highly recommended)

Item #	Description of Document	Format for Electronic Submission	Response for Electronic Submission	Response for Hardcopy Submission
4	Pages 1 and 2 of Solicitation document with Ink Signatures	PDF		
<b>Attachment 1 - Price Pages</b>				
5	Vendor Information	Excel		
6	Category Discount	Excel		
7	Lot 1 Software	Excel		
8	Lot 2 Hardware	Excel		
9	Lot 3 Cloud	Excel		
10	Lot 4 Implementation	Excel		
11	Documentation of Reasonableness of Price	Excel preferred, PDF acceptable		
<b>Attachment 2 - Administrative Information</b>				
12	1-Vendor Information	Excel		
13	2-Vendor Agreements	Excel		
14	3-General Questions	Excel		
15	4-NYS Required Certifications	Excel & PDF		
16	5-Encouraging NYS Business	Excel		
17	6-FOIL Redaction	Excel		
18	Vendor Checklist (this tab)	Not required		





 <b>NEW YORK STATE OFFICE OF THE STATE COMPTROLLER</b> <b>SUBSTITUTE FORM W-9:</b> <b>REQUEST FOR TAXPAYER IDENTIFICATION NUMBER &amp; CERTIFICATION</b>	
<small>TYPE OR PRINT INFORMATION NEATLY. PLEASE REFER TO INSTRUCTIONS FOR MORE INFORMATION.</small>	
<b>Part I: Vendor Information</b>	
1. Legal Business Name:	2. Business name/disregarded entity name, if different from Legal Business Name:
3. Entity Type (Check one only): <input type="checkbox"/> Individual Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Limited Liability Co. <input type="checkbox"/> Corporation <input type="checkbox"/> Not For Profit <input type="checkbox"/> Trusts/Estates <input type="checkbox"/> Federal, State or Local Government <input type="checkbox"/> Public Authority <input type="checkbox"/> Disregarded Entity <input type="checkbox"/> Other	
<input type="checkbox"/> Exempt Payee	
<b>Part II: Taxpayer Identification Number (TIN) &amp; Taxpayer Identification Type</b>	
1. Enter your TIN here: (DO NOT USE DASHES) <small>See instructions.</small>	
2. Taxpayer Identification Type (check appropriate box): <input type="checkbox"/> Employer ID No. (EIN) <input type="checkbox"/> Social Security No. (SSN) <input type="checkbox"/> Individual Taxpayer ID No. (ITIN) <input type="checkbox"/> N/A (Non-United States Business Entity)	
<b>Part III: Address</b>	
1. Remittance Address:	2. Ordering Address:
Number, Street, and Apartment or Suite Number	Number, Street, and Apartment or Suite Number
City, State, and Nine Digit Zip Code or Country	City, State, and Nine Digit Zip Code or Country
	Email Address
<b>Part IV: Vendor Primary Contact Information – Executive Authorized to Represent the Vendor</b>	
Primary Contact Name:	Title:
Email Address:	Phone Number:
<b>Part V: Certification and Exemption from Backup Withholding</b>	
Under penalties of perjury, I certify that:	
1. The number shown on this form is my correct taxpayer identification number (TIN), and	
2. I am a U.S. citizen or other U.S. person, and	
3. (Check one only):	
<input type="checkbox"/> I am not subject to backup withholding. I am (a) exempt from back up withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, or	
<input type="checkbox"/> I am subject to backup withholding. I have been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest or dividends, and I have not been notified by the IRS that I am no longer subject to back withholding.	
<b>Sign Here:</b>	
Signature	Title
	Date
Print Preparer's Name	Phone Number
	Email Address
<small>DO NOT SUBMIT FORM TO IRS – SUBMIT FORM TO NYS ONLY AS DIRECTED</small>	

- You should obtain a NYS Vendor ID before submitting a bid

1. OSC Substitute W-9 Form  
[http://www.osc.state.ny.us/vendors/forms/ac3237\\_fe.pdf](http://www.osc.state.ny.us/vendors/forms/ac3237_fe.pdf)

2. Send completed form to  
[OGS.sm.SSTTechnology@ogs.ny.gov](mailto:OGS.sm.SSTTechnology@ogs.ny.gov)

3. Once received, OGS will initiate the registration process with the NYS Office of the State Comptroller (OSC)

# Attachment 3

- Entire workbook must be submitted electronically
- Vendor must complete tabs 1-3:
  - Tab 1: Contractor Information
  - Tab 2: Reseller Information
  - Tab 3: Sales Agent Information
- OGS requires a secondary contact
  - The same person cannot be listed for every role

# Attachment 3 – Contractor Information

- NYS procurement card and prompt payment discount information
- If a contractor accepts a prompt payment discount, then all authorized resellers shall also accept a prompt payment discount
- If a contractor accepts a NYS procurement card (P-Card), then all authorized resellers shall also accept P-Card
- If a contractor offers an additional discount for purchases made with the P-Card, then the discount shall apply to all authorized reseller P-Card purchases as well

# Attachment 3 – Reseller Information

Reseller Information
<i>Lot 1 - Software</i>
<i>Lot 2 - Hardware</i>
<i>Lot 3 - Cloud</i>
<i>Lot 4 - Implementation</i>
Company Name:
Doing Business As:
Address: _____
Website:
Federal ID #:
NYS Vendor ID #:
Contact Name:
Title:
Telephone #:
E-Mail:
M/WBE Certification: (See 2.1 above for definition)
SBE: (See 2.2 above for definition)
SDVOB: (See 2.3 above for definition)

- Must be completed for each reseller partner
- Lots 1, 2, 3, and/or 4
- Contact information
- Special certifications
  - Small business enterprise (SBE)
  - Minority-owned business enterprise (MBE)
  - Women-owned business enterprise (WBE)
  - Service-disabled veteran-owned business (SDVOB)
- Search “NYS Directory of Certified Firms” [ny.newnycontracts.com](https://www.ny.newnycontracts.com)

# Attachment 3 – Sales Agent Information

Sales Agent Information
<i>Lot 1 - Software</i>
<i>Lot 2 - Hardware</i>
<i>Lot 3 - Cloud</i>
<i>Lot 4 - Implementation</i>
Company Name:
Doing Business As:
Address:
Website:
Federal ID #:
NYS Vendor ID #:
Contact Name:
Title:
Telephone #:
E-Mail:
M/WBE Certification: (See 2.1 above for definition)
SBE: (See 2.2 above for definition)
SDVOB: (See 2.3 above for definition)

- Not required
- Sales agents cannot also be listed as a reseller

# Attachment 4 – Verifiable Sales

- Submit:
  - Workbook with appropriate lot tabs filled out
  - Invoices/OGS sales reports
- Sales may be direct (through the manufacturer) or indirect (through a reseller)
- Sales must be made between 7/28/2019 and 9/2/2021

# Attachment 4 – Verifiable Sales

- Thresholds differ depending on the lot and type of sales
- Thresholds for sales to US government entities:
  - **Lot 1** – Software: \$1M
  - **Lot 2** – Hardware: \$5M
  - **Lot 3** – Cloud: \$200K
  - **Lot 4** – Implementation: \$250K
- Thresholds for sales to international entities:
  - **Each lot**: \$10M

# Attachment 4 – Verifiable Sales Lot Tabs

- When filling out sales, always start by using the drop-down menu in column B
- Drop down menus in columns C and D won't work unless a selection is made from column B

	A	B	C	D
9	Item Number	US Federal / US State / International	Government Entity Type	Government Entity Name
10	1			
11	2	FEDERAL		
12	3	ALASKA		
13	4	ALABAMA		
14	5	ARIZONA		
15	6	ARKANSAS		
16	7	CALIFORNIA		
17	8	COLORADO		
		CONNECTICUT		



# Attachment 4 – Verifiable Sales - International

- International sales are made to a federal or national government entity located in the United Kingdom, France, Lithuania, Estonia, Singapore, Spain, Malaysia, Canada, or Norway (Global Cyber Index 2018 Top 10)
- When adding an international sale, the threshold for all lots will automatically change to \$10M USD

**IMAGE OF EACH PAID INVOICE MUST BE INCLUDED WITH VENDOR SUBMISSION**

**MINIMUM SALES TO BE DEMONSTRATED**  
**\$10,000,000.00**

Item Number	US Federal / US State / International	Government Entity Type	Government Entity Name
1	<i>INTERNATIONAL</i>	<i>Canada</i>	<input type="text"/>
2			

# Attachment 5 - Insurance

- Attachment 5 lists all insurance requirements for the contract
- Insurance should be submitted in electronic form
- Company names and federal employer identification numbers (FEINs) must match the name and FEIN of the entity that is bidding

# Attachment 5 – Insurance

- Technology errors and omissions (Tech E&O) and data breach/cyber (Cyber) policies may be combined, but policies must meet the combined limit
  - For example, Lot 1 requires \$1M in Tech E&O and \$1M in Cyber
  - If both policies are combined, then the combined policy needs to be for \$2M
- Workers' compensation and disability coverage must be submitted on one of the NYS forms, not on a certificate of insurance
  - Acceptable forms include Form C-105.2 (Workers' Comp) and Form DB-120.1 (Disability)
  - Full list of accepted forms can be found in Section B.6 of Attachment 5

# Common Pitfalls & How to Avoid them

# DO THIS!

1. Submit Attachment 1 – Pricing Pages

**FAILURE TO SUBMIT IS AN AUTOMATIC DISQUALIFICATION!!!!**

2. Use consistent vendor data across forms – name and FEIN

3. Read instructions for forms



# Best Practices

1. Use the submission checklist to ensure completion
  - This tool is for you and does not require submission to us
  
2. Recertify your standard vendor responsibility questionnaire (SVRQ) before bid submission
  - Certifying online is strongly recommended and can be done at:  
<https://www.osc.state.ny.us/state-vendors/vendrep/file-your-vendor-responsibility-questionnaire>
  
3. During bid clarifications, respond quickly and provide the full story

# Best Practices – Q&A

- Use Q&A wisely – be **specific**, as we cannot ask clarifying questions
- Tell us specifically if something would exclude you from bidding rather than asking a section be removed without reason
  - What's the barrier?
- Consider the volume – questions take time to consider and provide an appropriate response

# Key Events

Event	Date	Time
Closing Date for 1 <sup>st</sup> Inquiry	7/12/2021	N/A
Tentative Posting of Responses to 1 <sup>st</sup> Inquiry	8/3/2021	N/A
Closing Date for 2 <sup>nd</sup> Inquiry	8/12/2021	N/A
Tentative Posting of Responses to 2 <sup>nd</sup> Inquiry	9/2/2021	N/A
Submissions Due	9/29/2021	11:00 AM ET
Tentative Contract Award Notifications Commence	11/24/2021	N/A



# Restricted Period Currently In Effect

## Designated Contact Email

Manufacturer Based IT Umbrella:

[OGS.sm.SSTTechnology@ogs.ny.gov](mailto:OGS.sm.SSTTechnology@ogs.ny.gov)

OGS Restricted Periods List:

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

(NOTE: You may need to copy the URL and paste it into your web browser's address bar to get the list to display properly.)

## What is a restricted period?

This is the time beginning with the release of a solicitation and ending after the final contract is awarded.

During this time, make sure to direct your questions to the designated contacts.



# OGS Responds to Selected Questions

Questions will be brought into the official Q&A document.

Official answers are those in the official Q&A document.

