



Office of
General Services

GOVBUY PROCUREMENT CONFERENCE

November 21-22, 2024

Empire State Plaza Convention Center, Albany, NY



PBITS and HBITS: Optimizing Your IT Service Projects

Meeting Room 5

Nov. 21, 2024 | 12:00 PM – 1:15 PM

PANELISTS

Kylesha Davis, Assistant Director, OGS

Sean Hume, Assistant Director, OGS

SESSION TOPICS

IT Portfolio Overview

PBITS Overview and Updates

HBITS Overview and Updates

Restricted Periods 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

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



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IT Projects



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Core Elements of an IT Project

PROJECT PLAN

Identify the parameters, action steps, timing, budget, roles, and resources required to satisfy goals of the project

PEOPLE

Determine staffing needs (quantity, titles, skill levels, duration) to successfully implement the project

PRODUCTS

Identify the hardware, software, cloud offerings, and product implementation services needed for the project



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Project Based Information Technology Services (PBITS)

Used to obtain IT consulting services for individual IT projects

Payments are made for accepted fixed priced deliverables, not on an hourly basis

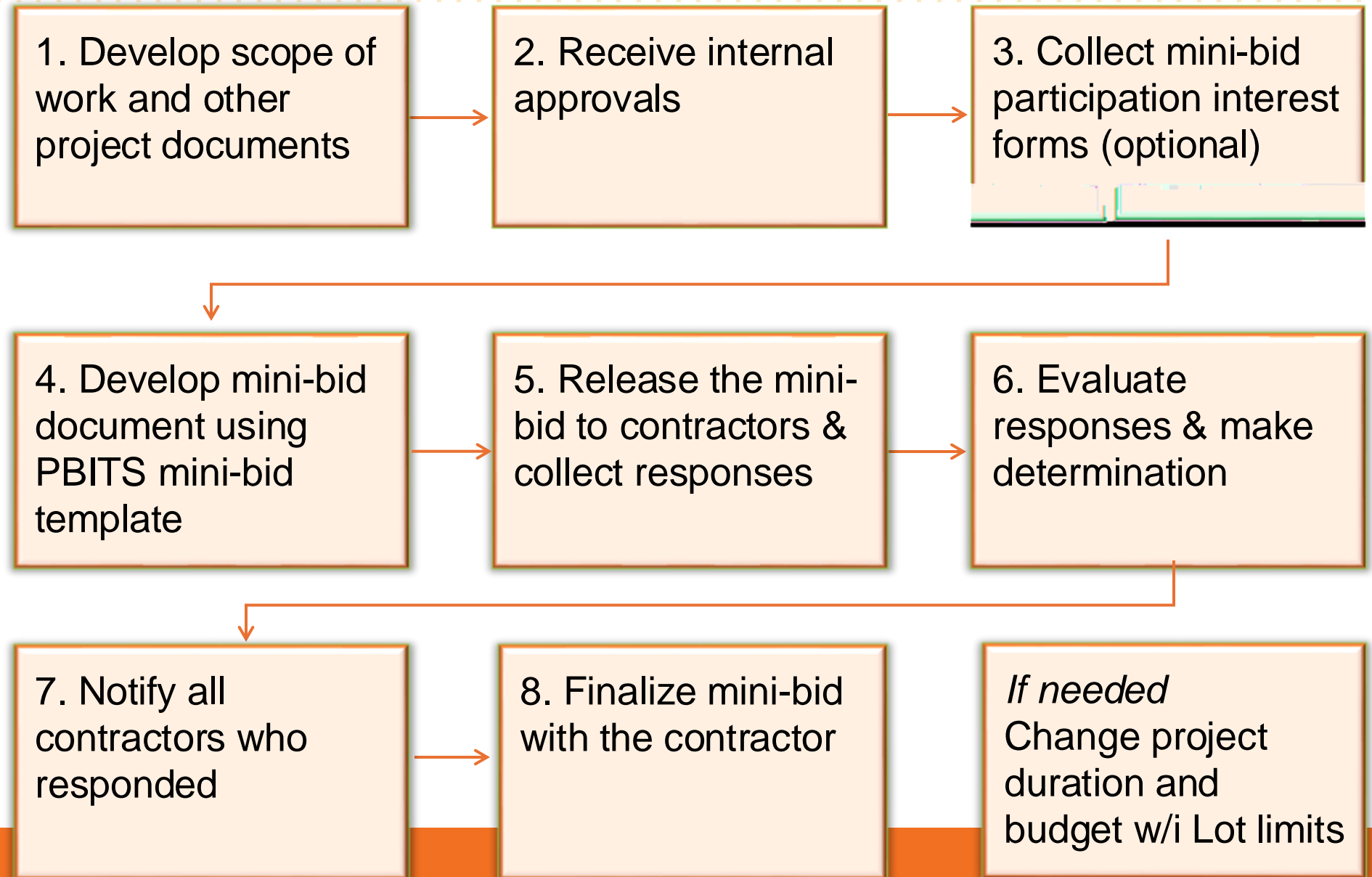
Contractor responsible for producing a viable product

Diversity of contractors

Expansive range of eligible IT related services



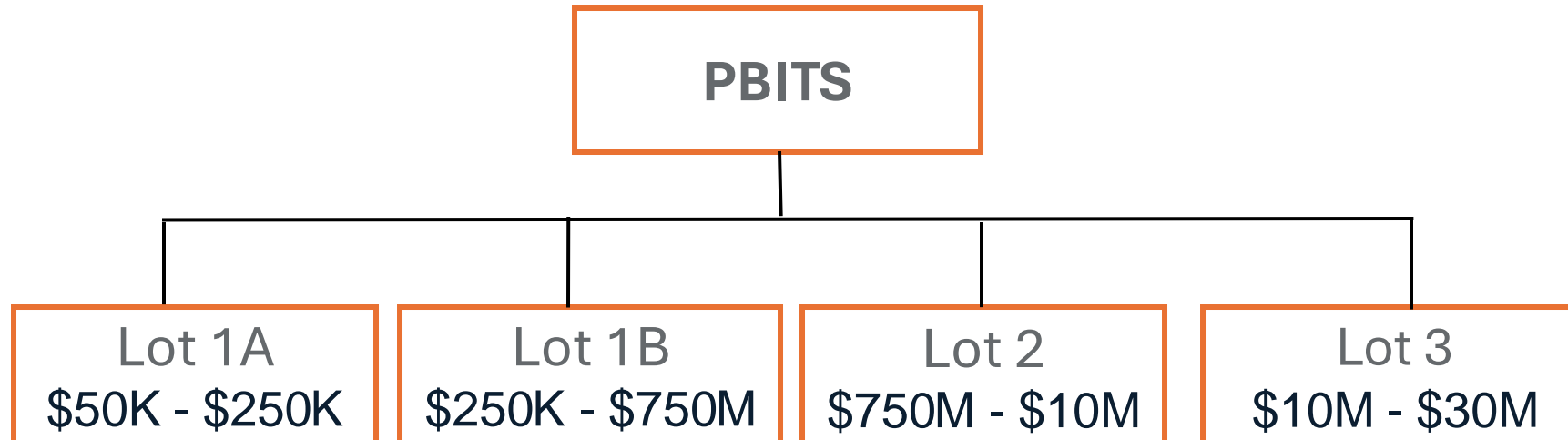
PBITS: Process Overview



Updates in the *New PBITS Award*

Lots and Thresholds

The contract is divided into lots based on anticipated Project cost



Additional Updates in the *New PBITS Award*

TERMS

- No-Cost Extension options added (up to 2 years /engagement)
- Max engagement including extensions is now 5 years
- Enhancement Budget increased from 10% to 25%
(still must be included when mini-bid is first issued)



Additional Updates in the *New PBITS Award*

SCOPE

- Short term staff aug added (up to 59 days)
- Managed Services added
- Scope development assistance or full development added



Additional Updates in the *New PBITS Award*

CONTRACTOR TERMS

- CPI price adjustment cap raised to 5%
- Mini-bid reporting requirement



Considerations for a Successful PBITS Project

Read the How to Use

Clearly define your scope of work

Include Budget Enhancement in mini-bid

Don't be intimidated - use the templates

Use measurable deliverables

Maximize knowledge transfer opportunities



Resources for PBITS



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

TEMPLATE INFORMATION

PROJECT BASED INFORMATION TECHNOLOGY CONSULTING SERVICES (PBITS)
(STATEWIDE)

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](#)



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HBITS Team Members

OGS has a dedicated HBITS team to support our Contractors and all Authorized Users (AU):

- Sean Hume, Assistant Director
- David Gambacorta, Team Lead
- Heather Moore, CMS2
- Kate Bradley, CMS2
- Stav Layne, CMS1
- Robert Waldron, CMS1
- Quinn Nolan, CMS1 - Trainee
- Jaswanti Ramnauth, CMS1 - Trainee
- Lynn Pinzer, CMS1 (Part Time)

About HBITS (Award 23158; Group 73012)

- 10-year contract (5-year extension completed July 2024)
 - July 1, 2019 - June 30, 2029
- Currently, there are 30 Contractors (all currently active)
- Contractor status as active/inactive is updated annually based on performance-based metrics
- Contractors often utilize Subcontractors to fulfill Authorized User needs

Goals of the HBITS Team

- Assist Authorized Users (Executive and Non-Executive Agencies) in receiving quality services
- Stimulate competition and save money through an effective HBITS process
- Evaluate Contractors using a performance-based metric driven process and workflow
- Ensure awards are based on a consistent evaluation process
- Maintain a dynamic group of quality Contractors
- Increase MWBE, SDVOB, and SBE Opportunities
- Utilize a fast, consistent invoice process for Executive Agencies

About HBITS – Office of Business Diversity (OBD) Goals

- 6% New York State Certified Service – Disabled Veteran Owned Businesses (SDVOB) Goals
- 30% New York State Certified Minority and Women Owned Business Enterprises (MWBE) Goals:
 - 15% MBE (Minority-Owned Business Enterprises)
 - 15% WBE (Woman-Owned Business Enterprises)
- 17 HBITS Contractors are MBEs and/or WBEs

About HBITS (Award 23158; Group 73012)

- FORM 1- Task Order Request Form
- FORM 2 - Candidate Response Form
- FORM 3A - Authorized User Technical Evaluation Form
- FORM 3A - Authorized User Technical Evaluation Summary
- FORM 3B - Authorized User Interview Evaluation Form
- FORM 3B - Authorized User Interview Summary
- FORM 4 - Selected Candidate Evaluation
- FORM 5 - Candidate Modification Request
- FORM 6 - Authorized User Issue Form

HBITS Process

ROLE	TASKS	Time Line	Forms
Authorized User	<ul style="list-style-type: none"> Obtains all approvals Internal, PTP, B1184, and Federal, if applicable Completes and submits a FORM 1 - Task Order Request, Billing Chart and applicable justification documents to the HBITS Team 		FORM 1
HBITS Team	<ul style="list-style-type: none"> Reviews the FORM 1 Validates all data fields and ensures compliance with Contractual terms Submits the FORM 1 and a sample FORM 2 - Candidate Response to the Contractors 	1-3 days	FORM 1 FORM 2
Contractors	<ul style="list-style-type: none"> Reviews the FORM 1 and sample FORM 2 Determines whether or not to submit a Candidate for consideration Submits completed FORM 2 for proposed Candidate(s) 	10 days or 5 days (Expedite)	FORM 2
HBITS Team	<ul style="list-style-type: none"> Reviews the submitted FORM 2 Validates that Candidate meets Mandatory Requirement and at least 60% of the Requested Qualifications Performs Cost Methodology evaluation Sends appropriate notifications to Contractors regarding the status of their submitted Candidate(s) - Released or forwarded to Authorized User 	1-3 days	FORM 2
Authorized User	<ul style="list-style-type: none"> Uses the points assigned during the Technical Review to determine the most technically qualified Candidates to interview Schedules interviews (minimum of 3 for 1 Position) Completes FORM 3A - Authorized User Technical Evaluation for each Candidate received and summarizes results on a FORM 3A Summary - Authorized User Technical Evaluation Summary Submits all FORM 3A documents to the HBITS Team, advising which Candidates are selected for interview and which Candidates require release 	1-5 days	FORM 3A FORM 3A Summary
	<ul style="list-style-type: none"> Conducts interviews for non-released Candidates to validate initial score (up to 80 points) and assign up to 20 points for the interview to determine the overall Candidate score. Completes FORM 3B - Authorized User Interview Evaluation for each Candidate interviewed and summarizes results on a FORM 3B Summary - Authorized User Interview Summary Selects the highest scoring Candidate Submits all FORM 3B documents to the HBITS Team, advising which Candidate(s) is selected for interview and which Candidates require release Retains copies of all HBITS Forms for the Procurement Record 		FORM 3B FORM 3B Summary
Authorized User & Contractor	<ul style="list-style-type: none"> Contractor and Authorized User collaborate to finalize Onboarding of selected Candidate(s) Authorized User submits Onboarding information for the selected Candidate(s) to the HBITS Team 	1 to 9 days	
HBITS Team	<ul style="list-style-type: none"> Sends notification to Contractor regarding the status of their submitted Candidate(s) - Released Records Onboarding detail and uses to verify submitted Contractor Invoices 		
Total Time Frame		9 to 30 days	

By the Numbers Annually (Estimated)

- Total Sales: \$155 Million (FY 2023-24)
 - Increases 15% Annually
- HBITS Team Duties
 - 770 Task Orders Processed
 - 30,800 Form 2s Reviewed
 - 360 Invoices Reviewed and Approved
 - 3,600 Sub-bills Entered and Approved
 - 600 Sales Reports Processed and Compared to Monthly Invoices
 - 30 Annual Contractor Evaluations
 - 60 Purchase Order Change Notices processed

Contact OGS HBITS

HBITS has 4 dedicated email accounts for correspondence:

- For State Agencies - ogs.sm.HBITS.StateAgencies@ogs.ny.gov
- For Contractors – ogs.sm.HBITS.Contractors@ogs.ny.gov
- For Non-Executive Agencies – ogs.sm.HBITS.NonExecutiveAgencies@ogs.ny.gov
- For Invoicing – ogs.sm.SST_Payment_Processing_Lockbox@ogs.ny.gov



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Questions?