Agenda

- How to use this contract
- Where to find helpful resources
- Review Case Studies
- Who to contact for questions

Speakers

- Mark Joly
- Jessica Paul
- Sonni D'Andrea
- Nancy Dougherty
- Shannon Prica-Kast
- PBITS Users from DOT, OMH, and OGS
  - David Mackey
  - Paul Murray
  - Susan "Sue" Bixby

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Restricted Period Currently In Effect

Designated Contact

- Information Technology Umbrella Contract-Manufacturer Based - First Periodic Recruitment PS_SW_ITF@ogs.ny.gov

- Hourly Based Information Technology Services

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.

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IT Centralized Contract Suite Overview

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IT Contracts

Components of the OGS information technology contracting suite:

- HBITS – Hourly Based IT Services (2012, 2018)

- PBITS – Project Based IT Consulting Services (2015, 2016)

- IT Umbrella Contract - Manufacturer Based (2015, 2017)

  - Aggregate Buys

- IT Umbrella Contract - Distributor Based (2016)

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.

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When to use HBITS and PBITS

HBITS:

- Hourly Based
- Staff Augmentation
- 2 to 24 months

PBITS:

- Project Based
- Deliverables
- Up to 36 months

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Hourly Based IT Services Overview

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HBITS

- Assists Authorized Users in receiving IT services quickly

- Stimulates competition to lower costs

- Increased MWBE participation

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HBITS Update

- Current contract expires 10/31/18

- Solicitation to replace the current contract is in process and we do not expect any lapse in services

- Restricted Period is currently in effect

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Project Based IT Consulting Services Overview

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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

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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, <u>not on an hourly basis</u>

- 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

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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

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What Can You Use This Contract For?

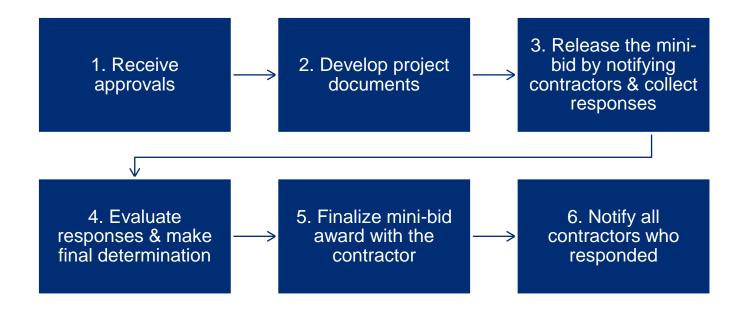## Out of Scope Projects

- 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

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PBITS: Suggested Process Overview

1. Receive approvals	→	2. Develop project documents	→	3. Release the mini-bid by notifying contractors & collect responses

4. Evaluate responses & make final determination	→	5. Finalize mini-bid award with the contractor	→	6. Notify all contractors who responded

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Resources on the OGS Website

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The PBITS Landing Page

http://www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM

NYS OGS - 73600 22772 ×

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

Project Based Information Technology Consulting Services (PBITS)	
Award Document PDF {Updated / Revised}	**Contract Period:** September 09, 2015 - September 08, 2018
Contract Updates PDF	**Group:** 73600 **Award:** 22772
Contractor Information PDF	**Use of Contracts:** All State Agencies and Non-State Agencies
Template Page PDF	**Contact Person:** Nancy Dougherty **Telephone:** (518) 408-3265
Mailing List By Lot	Contract Issued: September 17, 2015 **Contract Updated: March 26, 2018**
Contractor Template Page PDF	
How To Use PDF	
Historical Information PDF	
Customer Service	

Description:

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.
Authorized Users Contact: PBITS.AuthorizedUsers@ogs.ny.gov
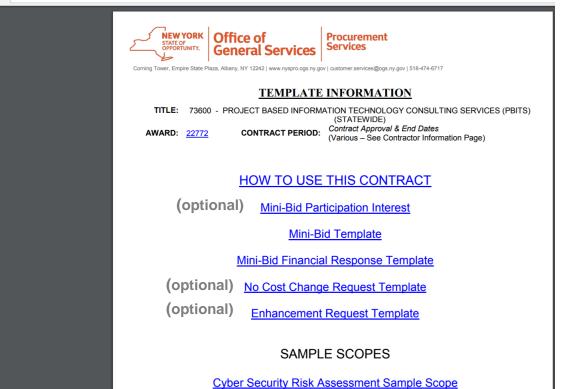**Contractors Contact:** PBITS.Contractors@ogs.ny.gov

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Available Templates

The PBITS Landing Page

http://www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM

Case Studies from PBITS Mini-Bid Users

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PBITS Mini-Bid Users

NYSDOT
Purchasing Unit
• David Mackey – Contract Management Specialist

NYSOMH
Consolidated Business Office
• Paul Murray - Contract Management Specialist 3

NYSOGS
eProcurement Team
• Sue Bixby - Business Systems Analyst

Remember: We're Here to Help

PBITS Contact

PBITS.AuthorizedUsers@ogs.ny.gov

Helpful Resources - PBITS

- Contract page:
  - www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM
- How to use guide:
  - www.ogs.ny.gov/purchase/snt/awardnotes/7360022772HowToUse.pdf

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Remember: We're Here to Help (continued)

HBITS Contact

HBITS.StateAgencies@ogs.ny.gov

HBITS.NonExecutiveAgencies@ogs.ny.gov

Helpful Resources - HBITS

- Contract page:
  - www.ogs.ny.gov/purchase/snt/awardnotes/7301222439can.HTM
- How to use guides:
  - www.ogs.ny.gov/BU/PC/hbits/docs/1_HowtoUseHBITS.pdf
  - www.ogs.ny.gov/BU/PC/hbits/docs/Form5HowToGuide.pdf

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Remember: We're Here to Help (continued)

IT Services Suite Contacts

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- IT Umbrella Contract - Manufacturer Based:
  MfrUmbrella.AuthorizedUsers@ogs.ny.gov

- IT Umbrella Contract - Distributor Based:
  PSDistUmbrella.AuthorizedUsers@ogs.ny.gov

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Remember: We're Here to Help (continued)

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  PSDistUmbrella.AuthorizedUsers@ogs.ny.gov

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Questions

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Who We Are & What We Offer

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Overview of OGS Procurement Services

We are the state's central procurement office responsible for establishing and managing Centralized contracts for goods and services needed by government entities across New York.

Who Can Use Our Contracts?

Who's Eligible

- State agencies
- Local governments
- Public and private schools and universities
- Charitable non-profit organizations
- Public authorities
- Public benefit corporations

How to Get Started

- To use our contracts you must complete an eligibility application to receive an authorized user number.

Where to find the eligibility application: www.nyspro.ogs.ny.gov/content/using-ogs-centralized-contracts-0

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PBITS: Suggested Process

1. Receive Approvals

2. Develop Project Documents
   - Scope of Work
   - Deliverables
   - Timeline
   - Evaluation Criteria & Method of Award

3. Release the mini-bid by notifying contractors & collect responses

4. Evaluate responses & make final determination

5. Finalize mini-bid award with the contractor

6. Notify all contractors who responded

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The PBITS Landing Page

http://www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM

Project Based Information Technology Consulting Services (PBITS)	
Award Document {Updated / Revised}	**Contract Period:** September 09, 2015 - September 08, 2018
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: March 22, 2017**
Contractor Template Page	
How To Use	
Historical Information	
Customer Service	

Description:

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Authorized Users Contact: PBITS.AuthorizedUsers@ogs.ny.gov
Contractors Contact: PBITS.Contractors@ogs.ny.gov

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Contractor Information

CONTRACTOR'S PRICING INFORMATION

TITLE: 73600 - PROJECT BASED INFORMATION TECHNOLOGY CONSULTING SERVICES (PBITS)
(STATEWIDE)

AWARD: 22772   **CONTRACT PERIOD:** *Contract Approval & End Dates* (Various - see below)

click here ▶ ▶ ▶   **INSURANCE MATRIX**   ◀ ◀ ◀ click here

LOT 1 LOT 2 LOT 3	PB090AA MBE	GCOM Software, Inc. 24 Madison Avenue Extension Albany, NY 12203 518-869-1671 Ext 230	FED ID# 202902922 NYS Vendor ID# 1000016650	Contact Information Price List Terms & Conditions
	CONTRACT PERIOD :		March 04, 2016 – September 8, 2018	

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Contractor Insurance Information

Group 73600   Award 22772   PBITS
Contractor Insurance Information

Contractor Name	Lot 1	Lot 2	Lot 3	Technology Errors and Omissions	Crime
3Di, Inc.		X		Accepted	Time of First Transaction
Abator Information Services, Inc.	X	X		Accepted	Time of First Transaction
Advizex Technologies, LLC		X		Time of First Transaction	Accepted
Aeon Nexus Corporation	X	X		Accepted	Time of First Transaction
Applied Geographics, Inc.		X		Accepted	Time of First Transaction
Ardent Technologies, Inc.	X	X		Time of First Transaction	Accepted
ATRIA Consulting, LLC	X	X		Accepted	Time of First Transaction
Bowne Management Systems, Inc.	X	X		Time of First Transaction	Time of First Transaction
Business Information Technology Solutions Inc.		X		Time of First Transaction	Time of First Transaction
VMware, Inc.		X		Time of First Transaction	Time of First Transaction
Windsor Solutions, Inc.		X		Time of First Transaction	Time of First Transaction
Zambri & Associates LLC	X			Time of First Transaction	Time of First Transaction

OGS has made a change to the Insurance Matrix. Going forward, the Matrix will only list Contractors that have yet to submit accepted proof of Technology Errors & Omissions and/or Crime Insurance coverage that meets all contract requirements. Lot 1 and 2 Contractors were not required to meet these two insurance requirements until the time of their first transaction.

If an Authorized User does not see a Contractor's name on the Insurance Matrix, it is because of the above mentioned change. That is to say, any Contractor that does not appear in the Matrix has met all insurance-related contract requirements at this time.

Authorized Users may send any inquiries concerning the insurance status of all Contractors to **ogs.sm.PBITS.AuthorizedUsers@ogs.ny.gov**.

Mini-Bid Template

INSERT AUTHORIZED USER NAME
INSERT AUTHORIZED USER STREET ADDRESS
INSERT AUTHORIZED USER CITY, STATE, ZIP CODE
MINI-BID # **INSERT MINI-BID REFERENCE NUMBER**
INSERT PROJECT NAME

CONTRACT CATEGORY: PROJECT BASED INFORMATION TECHNOLOGY CONSULTING SERVICES GROUP: 73600 AWARD NUMBER: 22772 FIXED-PRICE BASIS ONLY Insert Lot No.	
DESIGNATED CONTACTS	
Primary Contact: **Insert First and Last Name** E-mail address: **Insert E-Mail Address**	Secondary Contact: **Insert First and Last Name** E-mail address: **Insert E-Mail Address**

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)

If different than above, please mail the signed and notarized original of this document and any completed Attachment(s) to the following address:

Insert First and Last Name
INSERT AUTHORIZED USER NAME
INSERT AUTHORIZED USER STREET ADDRESS
INSERT AUTHORIZED USER CITY, STATE, ZIP CODE

INSERT PROJECT NAME

1.   PROJECT OVERVIEW

(Provide a brief overview of the project. Much of this information may be extracted from existing documents such as Project Charter, Business Case, etc. Fields may be modified or updated as required.)

1.1 PROJECT BACKGROUND

(Please provide Contractors with a short summary of the project's history and proposed approach, such as:
- *Short statement of the business need and problem to be resolved*
- *Time line or review of major dates in the project development process*
- *Authorized User organizational units and key personnel involved in advancing the project*
- *Alternative solutions or implementation strategies evaluated)*

1.2 PROJECT PURPOSE / OBJECTIVES

(Identify the key end results that the project will achieve when successfully executed. Measurable performance indicators for anticipated benefits may also be listed here.)

1.3 BUSINESS PROCESSES IMPACTED

(Review major changes in the way business will be conducted once the project is complete (if any).)

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Mailing Lists By Lot - Designated Email Addresses

LOT 3 DESIGNATED EMAIL ADDRESSES		
LOT 3 Contractor	**Designated Email**	**MBE/WBE/SB**
22nd Century Technologies, Inc.	govt@tscti.com	MBE
Accenture LLP	preetham.morkonda@accenture.com	
CGI Technologies and Solutions, Inc.	daniel.santandrea@cgi.com	
CherryRoad Technologies Inc.	kmulholland@cherryroad.com	
CRGT Inc.	hzach@crgt.com	
Currier, McCabe & Assoc. (CMA)	proposals@cma.com	WBE
Deloitte Consulting LLP	aquinonescardona@deloitte.com	
First Data Government Solutions, LLP	david.sodergren@firstdata.com	
Gartner Inc.	meg.collins@gartner.com	
GCOM Software, Inc.	julie@gcomsoft.com	MBE
HP Enterprise Services, LLC	Val.koricki@hp.com	
KPMG LLP	gplante@kpmg.com	
Metaformers, Inc.	contracts@metaformers.com	
New York State Technology Enterprise Corp (NYSTEC)	OGS-ITConsulting@nystec.com	
NTT Data, Inc. D/B/A Subsidiary of NTT Data International Services, Inc., Boston, MA	anthony.grego@nttdata.com carol.fitzgerald@nttdata.com	
Office of General Services	pbits.authorizedusers@ogs.ny.gov	
PruTech Solutions, Inc.	PBITS@PruTech.com	MBE/WBE
Systems Made Simple, LLC	christine.fowler@systemsmadesimple.com	
Tata America International Corp.	gene.taranto@tcs.com	
Unysis Corporation	ron.sautter@unisys.com	

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