



**Office of
General Services**

Overview

Information Technology Umbrella Contract Manufacturer Based (Statewide)

February 5, 2015

Presentation

- Housekeeping
- Introductions
- Umbrella Contract overview
- Example procurement methods
- Intermission
- Vendor submission (High level overview)
- Intermission
- Empire State Development-M/WBE



Housekeeping

- Silence cell phones
- Emergency exits
- Restrooms
- Audience questions / submission cards



Electronic Question Submissions

PS_SW_ITF@ogs.ny.gov

Kathy

McAuley

Assistant Director Procurement Services



**Office of
General Services**

Susan Filburn

Deputy Chief Procurement Officer
Acting Chief Procurement Officer

Information Technology Umbrella Contract Manufacturer Based (Statewide)

Solicitation Number: **22802**

Group: **73600**

Information Technology Unit Contract
Manufacturing Services (Statewide)

Solicitation Number: **22802**

Group: **73600**

Restricted Period currently in effect



Ken Schultz

Associate Attorney

Restricted Period

The designated contacts for this solicitation at: **PS_SW_ITF@ogs.ny.gov**

Dewan Bristo

Patricia Colomb

Sharon Featherstone

Ann Fisher

Karen Fowler

Marc Kleinhenz

Sheila Long

Kathy McAuley



Umbrella Contract Overview

Highlights

Open to Original Equipment Manufacturers (OEM) only

Resellers are not eligible for contracts

Manufacturers are strongly encouraged to use resellers

Manufacturers are encouraged to include MBE's, WBE's, SBE's, and Service-Disabled Veteran-Owned Business's (SDVOB) as resellers

M/WBE contract goals have been established for each Lot



Contract Exclusions

Consulting services

Large scale IT support infrastructure such as switch gear, generators, smoke detection, fire suppression and cooling systems

Stand-alone Third Party Products

Key Benefits

Speed to market

Flexible

Broadens market base

Permits addition of future Lots

Templates and training

Standardized price list format

Periodic recruitment

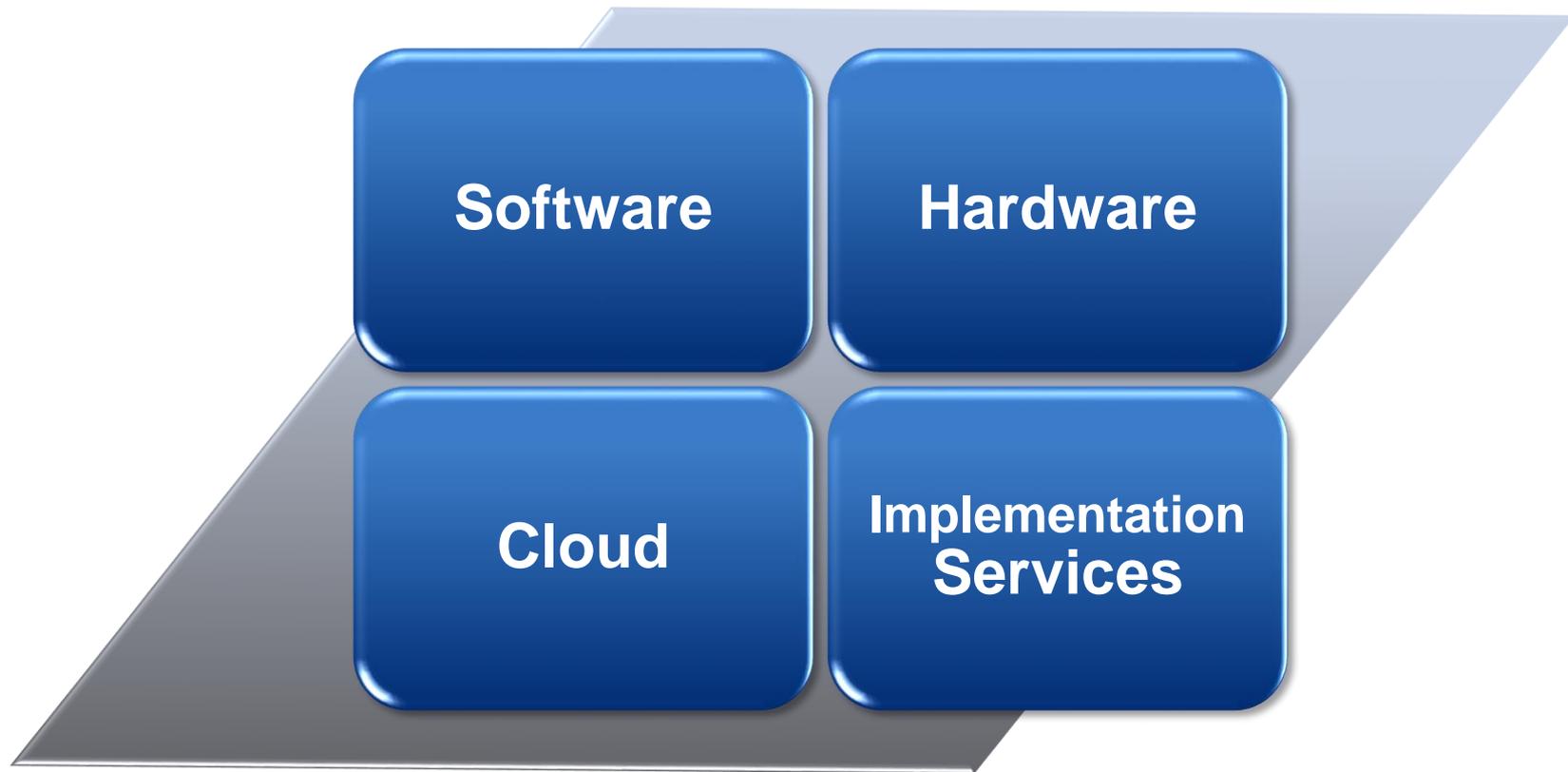
Standardized terms and conditions

Competition between vendors

Expanded product categories



Lot Structure



Software Lot

1



Software Lot – Inclusion Examples

Software manufacturer only

Software Licenses for Contractor's proprietary product line

On premise product

Fleet management (management of software license inventory)

Pre-packaged training

Pre-packaged installation

Prepackaged maintenance and support

Software only bundles



Software Lot - Exclusion Examples

Cloud offerings

Consulting services

Customization services

Implementation

Configuration

Customized training

Stand-alone professional services

Stand Alone Third Party Products

SKUs that equate to “blocks of hours”

Hardware Lot

2



Hardware Lot – Inclusion Examples

Hardware Manufacturers Only

Appliances / Server & Mainframe Hardware

On Premise Only

Hardware / Related Software bundles

Storage

Telecommunications Hardware, System Peripherals & Accessories

Key Systems / Private Branch Exchange

Desktop / Workstation / Laptop / Tablet

Audio / Video Conferencing Hardware



Hardware Lot – Exclusion Examples

Cloud paired appliances

Cloud offerings

Customized training

Implementation services

Printers, peripherals, accessories and related services (OGS Group 75525) until such time as those awards are no longer valid

Cloud Lot

3



Cloud Computing – Inclusion Examples

Cloud manufacturers only

SaaS, PaaS, IaaS, XaaS

Cloud Bundled Services

Managed Services including:

- Internet Service
- Audio / Video Conferencing Service
- Interactive Voice Response Service (IVR)
- Broadcast / Emergency Notification Service



Cloud Computing – Exclusion Examples

Consulting services

Customization services

Implementation

Configuration

Customized training

Stand-alone professional services



Implementation Lot

4



Implementation

Implementation Services are:

For the efficient deployment of Products procured under Lots 1, 2 and/or 3

Limited to services required to install or implement products from other Lots



Implementation – Inclusion Examples

Business Process Analysis for new systems or Cloud

Project Management Services

Data Conversion

Customized Training

Programming Services capped at no more than 10% of the total implementation cost



Implementation – Restrictions

Restricted to those Vendors who have submitted a response to Lots 1, 2, and / or 3

Implementation services must be for Products purchased from Lots 1, 2 or 3

Implementation services must be procured within 12 months of the Product purchase

Maximum implementation project shall not exceed 36 months

No extensions of projects beyond 36 months



Implementation – Exclusion Examples

On going services such as:

- Staff Augmentation
- Web Hosting
- Automated Network Monitoring
- Equipment Maintenance
- Application Service Provisioning

Customization of Software

Consulting not related to implementation of Products in other Lots of the Contract

Implementation of Products 12 months after the initial purchase

Programming Services requiring more than 10% of the total implementation costs



Procurement Methods

Participation in Authorized User RFQ

Across multiple manufacturers and their resellers

Manufacturer specific when manufacturer has 5 or more resellers (not agents)

Manufacturer specific transactions to a manufacturer with less than 5 resellers are not allowed

Resellers must be able to quote independently

Manufacturer agents cannot be used to show competition



Example Procurement Scenarios

Manufacturer brand pre-defined if reseller competition exists

Manufacturer brand not pre-defined, competition among all manufacturers and their resellers in the Lot

Implementation services only, competition among all manufacturers and their implementation resellers only.

Total Cost of Ownership (TCO) based on factors defined by Authorized User (AU) among manufacturers and their resellers in the applicable Lots

Performance based model allows AU to define current environment and performance output measures. Manufacturers and resellers offer solution(s) based on existing product offerings within that manufacturers Contract Lot(s)



INTERMISSION

10 Minutes



Vendor Submission

The do's and the don'ts.

Key Dates

Solicitation Key Events

Vendors must pay strict attention to Key Events / Dates (Solicitation Section 1.9):

Event	Date	Time
Solicitation Release	1/6/2015	N/A
Closing Date for Pre-Solicitation Conference Registration	1/20/2015	11:00 AM ET
Pre-Bid Conference	1/23/2015	01:00 PM ET
Closing Date for 1 st Inquiry	1/27/2015	11:00 AM ET
Anticipated Posting of Responses to 1 st Inquiry	2/24/2015	N/A
Closing Date for 2 nd Inquiry	3/13/2015	11:00 AM ET
Anticipated Posting of Responses to 2 nd Inquiry	3/31/2015	N/A
Closing Date for Receipt of Attachment 10 - Vendor Submission Intent	4/14/2015	11:00 AM ET
Submissions Due / Submission Opening	4/21/2015	11:00 AM ET
Tentative Contract Award Notifications Commence	5/22/2015	N/A

Inquiry Period

There are two inquiry periods for this Solicitation.

Per Solicitation Section 1.13, all questions, comments and deviations must be submitted in writing using the Attachment 6 Inquiry and Bid Deviation Template and **e-mailing to PS_SW_ITF@ogs.ny.gov** by the deadline(s) located within Solicitation Section 1.9 Key Events and Dates.

Remember to name the file Vendor Name – Solicitation 22802

Remember to identify email subject line as Vendor Name – Solicitation 22802

OGS will not answer questions that are not received in the required format.

Please take the time to read each solicitation document thoroughly.



Intent to Submit OGS Solicitation

Per Solicitation Section 1.12, OGS is requesting Vendors submit Attachment 10 - Intent to Submit OGS Solicitation as early as possible. The primary purpose is for OGS to begin pre-screening the Vendor Responsibility Questionnaire. Vendor Responsibility is one of several important steps in reviewing a Vendor's submission.

The sooner OGS can begin this review, the sooner OGS will award Contracts to Vendors that meet all of the Solicitation Requirements.

Be sure to complete the form in its entirety and email to PS_SW_ITF@ogs.ny.gov as soon as possible!

Please do not submit an Intent to Submit OGS Solicitation before you have received your NYS Vendor Identification Number.



Vendor Qualifications

Requirements vary by Lot

Minimum sales thresholds per Lot

Standard attestations for Workers Compensation, insurance, Vendor Responsibility, etc. will apply

The Vendor is advised to thoroughly read and follow all instructions contained in the Solicitation and Attachments

Solicitation Updates

Updates will only be announced within the NYS Contract Reporter (<https://www.nyscr.ny.gov/>). Vendors are encouraged to utilize automatic notification services by selecting “Bookmark this ad” and “Send me notification updates on this.”

1	Title:	Information Technology Umbrella Contract Manufacturer Based (Statewide)	 View this ad
	Agency:	General Services, NYS Office of New York State Procurement	 Share this ad
	Issue Date:	01/06/2015	 Bookmark this ad
	Due Date:	04/21/2015	 Send me notification updates on this
	Location:	All NYS counties	
	Category:	Information Technology – Commodities	
	Ad Type:	General	

All documents and updates can be found at the following link:

<http://www.ogs.ny.gov/purchase/biddocument/22802bid.asp>

Vendors are reminded to pay close attention to the OGS web site for updates to this Solicitation.



Office of
General Services

Attachment Review

Attachment – 1 Price Pages

- Documentation of Reasonableness of Price
- Published Price List

Attachment – 2 Vendor Questionnaire

Attachment – 3 Contractor and Reseller Information

Attachment – 4 Verifiable Sales

- Qualifying Invoices

Vendor Submission

A response to this Solicitation includes many Electronic and Hardcopy documents. A detailed listing of the documents and formats can be found in **Solicitation Section 3.1 Contents**.

Remember . . .

- Pay close attention to instructions
- Refer back to the Solicitation for additional information
- Be sure to include any additional documentation needed for each Attachment
- Do not alter or change the structure of any of the documents
- Pay close attention to the required documentation and the required format
- Some documents require BOTH electronic and hardcopy submission
- Pay close attention to Solicitation deadlines
- Clearly label BOTH e-mail and hardcopy correspondence. OGS is not responsible for late responses due to a Vendor's error in labeling the document



**A complete, accurate, responsive and
responsible submission
should result in timely Contracts**

INTERMISSION

10 Minutes



Question & Answer period

Responses given today are not binding. Only official responses to the first and second round of inquiries posted on the OGS website shall be binding.

**Please send your
questions to**

PS_SW_ITF@ogs.ny.gov

Brian Ansari

Empire State Development – M/WBE

Commercially Useful Function

Pursuant to 5 NYCRR § 140.1(f), a MWBE performs a commercially useful function when it is responsible for execution of the work of the contract and is carrying out its responsibilities by actually performing, managing, and supervising the work involved. To perform a commercially useful function, a MWBE must, where applicable and in accordance with any State Agency specifications, also be responsible, with respect to materials and supplies used on the contract, for ordering and negotiating price, determining quality and quantity, and installing. A MWBE does not perform a commercially useful function if its role adds no substantive value and is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of participation. OGS will assess whether a MWBE is performing a commercially useful function by considering the following:

- the amount of work subcontracted;
- industry practices;
- whether the amount the MWBE is to be paid under the contract is commensurate with work it is to perform;
- the credit claimed towards MWBE utilization goals for the performance of the work by the MWBE; and,
- any other relevant factors.



Brian Ansari

Economic Development Program/Empire State Development

Bansari@esd.ny.gov

(518) 292-5343



**A complete, accurate, responsive and
responsible submission
should result in timely Contracts**