



Purchasing Forum & Trade Show

PBITS:

Get IT Project Consultant Services

May 18 & 19, 2016



Agenda

Today you will learn:

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

Speakers

Daniel DeCamp

Nancy Dougherty

Mark Joly

Donna Pszeniczny



Who We Are & What We Offer

Overview of OGS Procurement Services



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

Who Can Use Our Contracts?

Who's Eligible

- State agencies
- Local governments (counties, cities, towns, villages)
- 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



Information Technology New Contract Suite

Overview of New IT Contracts

New Contracts

Three components of the new OGS technology contracting suite:

- **Project Based IT Consulting Services**
- Manufacturers Based IT Umbrella
- Distributor Based IT Umbrella

Easy to Use

- Training available to guide you through the buying process.
- 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.



Got Questions? Contact Us.

Designated Contacts

- Project Based IT Consulting Services:
PBITS.AuthorizedUsers@ogs.ny.gov
- Manufacturer Based IT Umbrella:
MfrUmbrella.AuthorizedUsers@ogs.ny.gov
- Distributor Based IT Umbrella:
OGS.sm.SSTTechnology@ogs.ny.gov

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.



Project Based IT Consulting Services Overview

What Can You Use This Contract For?

- Also known as PBITS, this contract is used to obtain consulting services for a project with payments made for deliverables, not on an hourly basis
- Projects range from the development of proprietary software solutions and customized training to project management
- Contractors are able to qualify for three categories, or lots, based on their qualifications



What Can You Use This Contract For?

Projects Included

- Tech. architecture advisory services
- Business analysis
- Proprietary software application development/customization, programming and integration
- Data information management (migration, conversion, manipulation, integration)
- Project management support services
- Data categorization
- Implementation of open-source software

Projects Not Included

- Staff augmentation or data entry services
- Hardware and software maintenance and support
- Prepackaged training courses
- eLearning
- 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



PBITS Contract Structure

It's broken into lots based on anticipated project cost.

- Lot 1 is for MWBE, SDVOB and small businesses
- Lot 3 includes higher insurance requirements



Where We Are

By the Numbers

- 113 contracts awarded
 - Lot 1: 51
 - Lot 2: 95
 - Lot 3: 19

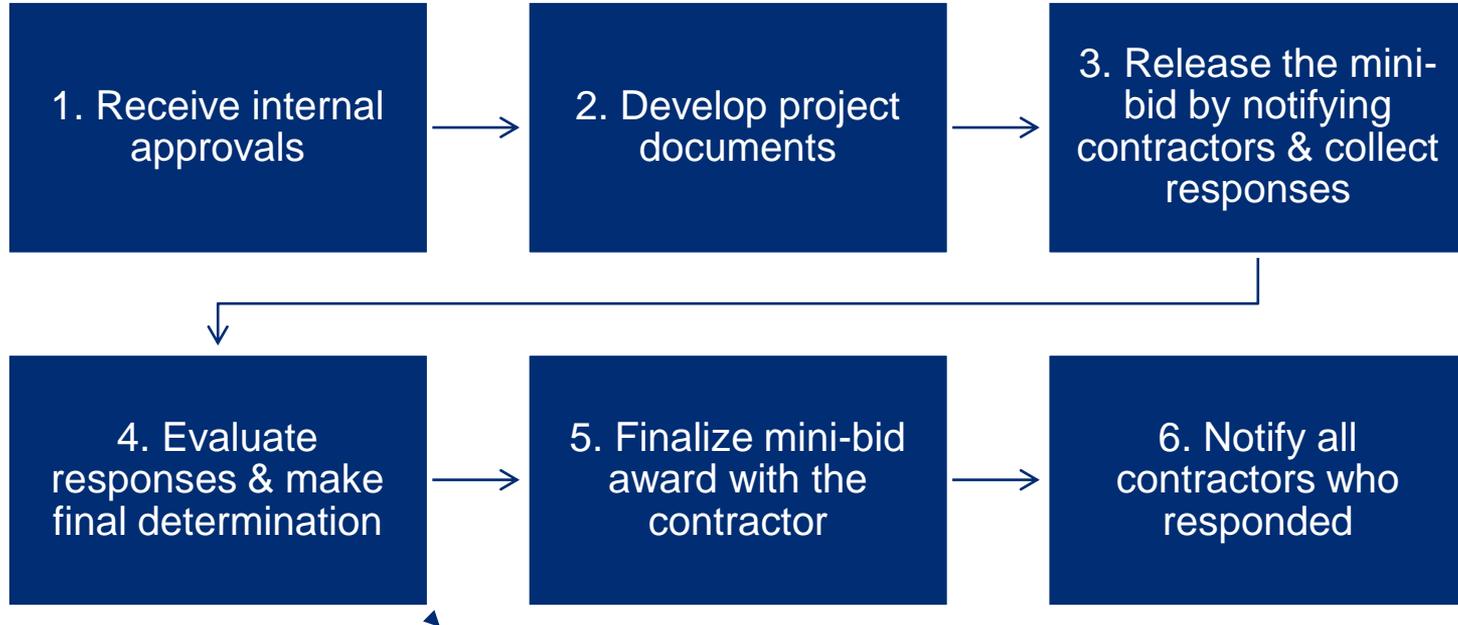
Training & Resources

- Training for contract users is underway
- Training for contractors coming soon
- Online resources being developed

Key Contract Components

- For consulting services related to a project only
- Each project has a maximum duration of **36 months**
- Maximum not-to-exceed pricing
- Standardized contractor requirements, terms, and conditions
- The contract includes periodic recruitment, making the opportunity for more contractors and more competition

PBITS: Process Overview



1. Receive Internal Approvals

- You must adhere to:
 - Statutory requirements
 - Procedures of the PBITS contract
 - Internal policies and procedures (B1184, PTP, ITIR, etc.)
 - Federal, state, and local statutes as applicable

2. Develop Project Documents

- Prepare a project scope of work that includes:
 - Budget
 - Timeline (including milestones)
 - Deliverables (including products and reports)
- All of these become part of your procurement record.

Use templates to navigate this process:
www.ogs.ny.gov/purchase/snt/awardnotes/7360022772TemplatePage.pdf

2. Develop Project Documents – Scope of Work

- Your **scope of work** should include:
 - What your organization is going to provide
 - Roles and responsibilities: project lead, approvals, contacts, etc.
 - Workplace logistics: parking, network connection, access to technical staff, computers, etc.
 - What the contractor will provide
 - Staffing, charts, tools, supplies, etc.
 - When the work will be completed (8am-4pm, 9am-5pm, afterhours, etc.)
 - Steps, phases, and deliverables this project will include
 - Including what success for each deliverable looks like
 - Risks and the mitigation strategies
 - Payment structure

2. Develop Project Documents – Scope of Work (continued)

A good scope of work includes:

- Milestones, timeframes
- Dependencies
- Roles and responsibilities
- Background checks, additional insurance
- Deliverables / payment points
- Key personnel interviews
- Location where work will be performed
- Risk projections and mitigation strategies
- Uptime / Response time
- Security conditions
- Disaster recovery, business continuity plans
- Data transfer services
- Chargebacks, liquidated damages and/or penalties



2. Develop Project Documents – Deliverables

- As you **develop project deliverables** make sure they are clear and objective. All parts must be defined and expectations set.
- Acceptance and rejection criteria must be clear
 - What are the timeframes for acceptance, and
 - What is the exact process for rejected deliverables and associated timeframes for resubmission

2. Develop Project Documents - Timeline

- As you **develop your project timeline** consider the following:
 - Shorter overall or expedited timeframes may cost more
 - Think carefully about your milestones (invoices or batches of hours are not appropriate milestones)



2. Develop Project Documents – Evaluation Criteria & Method of Award

- Your project documents should also include **criteria to evaluate the mini-bid responses**
 - The criteria and weighting you use must be finalized prior to the mini-bid release
- Method of Award is based on Best Value
 - Technical evaluation – maximum 70%
 - MWBE, SDVOB, and or SB (up to 5%)
 - Cost evaluation – minimum 30%

2. Develop Project Documents – Final Thoughts

- The scope of work defines the job for the contractor. It should clearly document the :
 - Project requirements
 - Timeline and Milestones
 - Deliverables
 - End product (What success looks like)
 - Required documents and reports that are expected to be provided by the contractor
 - Roles, responsibilities, risks, and expectations



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

How to Distribute

- Email your mini-bid documents all contractors in project lot
- On the contract page, select the “Mailing List by Lot” document to find email addresses by lot:
 - www.ogs.ny.gov/purchase/snt/awardnotes/7360022772can.HTM

Keep in Mind

- Minimum timeframes from the mini-bid release to the bid opening date:
 - Lot 1: 5 business days
 - Lot 2: 10 business days
 - Lot 3: 15 business days

Mailing Lists By Lot - Designated Email Addresses

Updated 5/4/2016

LOT 1 DESIGNATED EMAIL ADDRESSES

LOT 1 Contractor	Designated Email	MBE/WBE/SB
22nd Century Technologies, Inc.	govt@tscti	
Abator Information Services	andrew@abator.com	
Aeon Nexus Corporation	kileywittig@aeonnexus.com	
Ardent Technologies, Inc.	amandabrown@ardentinc.com	
LOT 2 DESIGNATED EMAIL ADDRESSES		
LOT 2 Contractor	Designated Email	MBE/WBE/SB
ATRIA Consulting, LLC	mbordman@atriaconsulting.com	
Bowne Management Systems, Inc.	gcakmak@bownegroup.com	
Business Logic	blogic@businesslogic.com	
Cogent Technologies, Inc.	ogs@donia.com	
Compulink Technologies Inc.	denise@compulink.com	MBE/SB
Currier, McCabe & Assoc. (CMA)	proposals@cmama.com	
Derive Technologies	info@derivetech.com	
Digits LLC	james.donahue@digitsllc.com	
DIRAD Technologies, Inc.	govadmin@dirad.com	
Documentation Strategies, Inc.	Tami.cole@documentationstrategies.com	
Donia & Associates LLC	ogs@donia.com	
ECC Technologies Inc.	jenstarks@ecc.com	
ExperSolve, Inc.	steve.smit@experimentsolve.com	
Garnet River, LLC	pgasparini@garnetriver.com	
GCOM Software, Inc.	julie@gcomsoft.com	MBE
Genesys Consulting Services Inc.	pbits@genesys.com	
IIT, Inc.	gov@iit-inc.com	
Compulink Technologies Inc.	denise@compulink.com	MBE/SB
Counterpointe Solutions, Inc.	mpuckett@cpoinete.com	
CRGT Inc.	gamal.hossack@salientcrgt.com	
CSG Government Solutions, Inc.	rfp@csgdelivers.com	

Updated 5/4/2016

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.	gamal.hossack@salientcrgt.com	
Currier, McCabe & Assoc. (CMA)	proposals@cmama.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	
International Business Machines Corp.	milvaney@us.ibm.com	
KPMG LLP	golante@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	



4. Evaluate responses & make final determination

- Evaluate the responses based on the mini-bid requirements
 - Evaluation tools cannot be altered after the mini-bid release
- Review hourly rates and reject any mini-bid responses that includes pricing above the “not-to-exceed” pricing in the contract
- You may want to do reference checks on past projects
 - Was the project on time?
 - Was the project on budget?
 - Were any liquidated payments assessed?
 - Did the final product meet or exceed expectations?
- Check the contract award page to make sure the tentative awardee has submitted all the required insurance documentation
 - If they do, you can proceed
 - If they don't, touch base with OGS to see if you should contact the vendor to advise them to submit the required documentation. You cannot make an award until they have met the contract insurance requirements

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 PARTICIPATION	OGS CONTRACT NUMBER	CONTRACTOR INFORMATION		CONTRACT SPECIFICS
LOT 1 LOT 2 LOT 3	PB200AA MBE	22 nd Century Technologies, Inc. 1 Executive Drive, Suite # 285 Somerset, NJ 08873 888-998-7284	FED ID# 223502121 NYS Vendor ID# 1000020035	Contact Information Price List Terms & Conditions
<i>CONTRACT PERIOD : September 25, 2015 – September 8, 2018</i>				



Contractor Insurance Information

Contractor Name	Lot 1	Lot 2	Lot 3	Commercial General Liability	Business Automobile Liability	Umbrella	Technology Errors and Omissions	Crime	Workers' Compensation	Disability Benefits
Donia & Associates, LLC	X	X		7/16/2016	Attestation	Not Applicable	Time of First Transaction	7/16/2016	9/19/2016	3/17/2017
DynTek Services, Inc.		X		10/1/2016	Attestation	10/1/2016	10/1/2016	10/1/2016	10/1/2016	5/4/2016
e.nfrastructure Technologies, Inc.		X		5/3/2016	5/3/2016	5/3/2016	Time of First Transaction	Time of First Transaction	5/3/2016	1/1/2017
ECC Technologies Inc.	X	X		11/7/2016	11/7/2016	11/7/2016	Time of First Transaction	Time of First Transaction	11/7/2016	12/31/2016
EMC Corporation		X		11/1/2016	11/1/2016	11/1/2016	11/1/2016	11/1/2016	11/1/2016	7/15/2016
Environmental Systems Research Institute, Inc.		X		12/15/2016	12/15/2016	12/15/2016	12/15/2016	12/15/2016	12/15/2016	7/1/2016
Ernst & Young LLP		X		6/1/2017	6/1/2017	6/1/2017	Time of First Transaction	Time of First Transaction	8/1/2016	12/31/2016
ExperSolve, Inc.	X			7/24/2016	Attestation	Not Applicable	7/24/2016	Time of First Transaction	1/1/2017	6/30/2016
First Data Government Solutions, LP		X	X	1/1/2017	1/1/2017	1/1/2017	3/31/2016	3/31/2016	9/8/2018	9/8/2018
Fountains Spatial, Inc.		X		10/1/2016	Attestation	10/1/2016	Time of First Transaction	Time of First Transaction	7/1/2016	8/16/2016
Garnet River, LLC	X	X		7/15/2016	Attestation	7/15/2016	Time of First Transaction	Time of First Transaction	7/15/2016	5/31/2016
Gartner Inc.		X	X	6/30/2016	6/30/2016	6/30/2016	6/30/2016	7/13/2016	6/30/2016	12/31/2016
GCOM Software Inc.	X	X	X	1/1/2017	Attestation	1/1/2017	1/1/2017	1/1/2017	1/1/2017	12/31/2016
Genesys Consulting Services, Inc.	X	X		12/31/2016	Attestation	12/31/2016	12/31/2016	1/15/2017	12/31/2016	12/31/2016
Geographic Information Services, Inc		X		3/25/2017	Attestation	3/25/2017	Time of First Transaction	3/25/2017	3/25/2017	12/26/2016
Grant Thornton LLP		X		7/31/2016	Attestation	7/31/2016	5/1/2016	7/31/2016	3/1/2017	6/9/2016
Greenman-Pedersen, Inc.		X		12/31/2016	12/31/2016	12/31/2016	6/30/2016	12/31/2016	12/31/2016	1/1/2017
HLN Consulting, LLC		X		12/7/2016	Attestation	12/7/2016	12/7/2016	1/15/2017	9/8/2018	9/8/2018
HP Enterprise Services, LLC		X	X	9/30/2016	9/30/2016	9/30/2016	9/30/2016	4/1/2017	9/30/2016	9/9/2018
IIT Inc.	X	X		8/13/2016	Attestation	Not Applicable	Time of First Transaction	8/13/2016	6/27/2016	9/30/2016
ImageWork Technologies Corp.	X	X		12/1/2016	Attestation	Not Applicable	4/3/2016	12/4/2016	4/3/2017	12/31/2016
Infor Public Sector, Inc.		X		11/30/2016	11/30/2016	11/30/2016	Time of First Transaction	11/30/2016	11/30/2016	12/31/2016
Information Builders, Inc.		X		3/9/2017	Attestation	3/9/2017	Time of First Transaction	10/14/2016	3/9/2017	6/30/2016
Information Methods Incorporated	X	X		6/16/2016	Attestation	6/16/2016	Time of First Transaction	Time of First Transaction	2/9/2017	1/4/2017
Information Resource Group, Inc		X		1/15/2017	1/15/2017	1/15/2017	8/22/2016	Time of First Transaction	8/20/2016	9/30/2016
Infosys International, Inc.	X	X		10/31/2016	10/31/2016	Not Applicable	Time of First Transaction	Time of First Transaction	10/31/2016	12/15/2016
innoSoul, Inc.	X			10/14/2016	Attestation	Not Applicable	Time of First Transaction	Time of First Transaction	9/20/2016	2/24/2017
International Business Machines Corporation		X	X	5/21/2016	5/21/2016	Not Applicable	11/1/2016	6/30/2016	1/1/2017	9/8/2018

5. Finalize mini-bid award with the contractor

- This is where you have discussions with the tentative awardee so that you both have a clear understanding of the roles and responsibilities for the project.
- You should negotiate to get the best possible price.
- Once in agreement, proceed with final documentation requirements utilized by your agency (entity).

6. Notify all contractors who responded

- Notify the tentative awardee and all non-awardees of the mini-bid results in writing
 - email is acceptable

Document the Project

In case of audits, make sure to include the following as part of your final procurement record:

- Approved requisition or purchase order
- DOB 1184 attachment (for state agencies)
- Bid distribution and announcements
- Pre-bid conference sign-in sheet & transcript
- Bid protests & responses
- Justification for rejecting bids or proposals
- Blank solicitation documents
- Questions & answers
- Evaluation instruments
- Completed evaluation score sheets and evaluation summary
- Bid tabulation
- Bidders list
- Reasonableness of price
- Awarded bid
- Proposals received
- If less than 3 bids received, no-bid/no-reply survey
- Any contractor correspondences
- Rejected bids with justification
- Tentative award letter
- Agreement/contract
- Consultant disclosure forms



Resources on the OGS Website

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 04, 2016
Contractor Template Page 	
How To Use 	
Historical Information 	
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	
Install Free Adobe Acrobat Reader for PDF Documents	



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Available Templates

HOW TO USE THIS CONTRACT

Mini-Bid Participation Interest

(optional)

Mini-Bid Template

Mini-Bid Financial Response Template

No Cost Change Request Template

(optional)

Enhancement Request Template

(optional)

How to Use This Contract

Group 73600 - Award 22772
Project Based Information Technology Consulting Services (Statewide) Page 1 of 7

How to Use This Contract

This document provides the Authorized User general instructions on how to use the Project Based Information Technology (IT) Consulting Services Contract. These instructions assume the Authorized User has a good knowledge of IT project procurement methodology. An Authorized User must familiarize itself with the OGS Centralized Contract terms and conditions. Additional general procurement information is available on the OGS website.

Section 1. General Information

1.1 OGS CENTRALIZED CONTRACT SCOPE

The Project Based Information Technology Consulting Services Contracts streamline the procurement of Project Based IT Consulting Services for Authorized Users of NYS OGS Centralized Contracts. To purchase fixed-price deliverable services, an Authorized User must use the process outlined in the OGS Centralized Contract.

1.2 LOT VALUES

OGS Centralized Contracts have been grouped into three (3) lots (see table below). Lot placement was determined by the Contractor's response to OGS Solicitation #22772.

Lot Number	Project Value
Lot 1 Limited to NYS MWBEs, NYS SDVOBs, and NYS SBs	Up to \$200,000
Lot 2	\$200,001 - \$7,500,000
Lot 3	\$7,500,001 - \$25,000,000

The estimated project value as per Lot maximum value, (inclusive of any Enhancement budget) shall be used to determine which Lot must be used. If the option of an Enhancement budget is included, the total value of the Mini-Bid cannot exceed the maximum value of the Lot. Mini-Bids must be completed within a single Lot.

1.3 REQUIREMENTS

- A competitive Mini-Bid is required for every transaction under this Centralized Contract.
- Mini-Bids can be distributed to no more than one Lot per project.
- An Authorized User should prepare a detailed Statement of Work using the Mini-Bid template.
- The Authorized User must distribute the Mini-Bid to all qualified Contractors in the selected Lot (unless a Contractor has removed itself from consideration via the Mini-Bid Participation Interest Template).
- All services performed for an Authorized User shall only be performed within the continental United States.
- An Authorized User shall conduct its Mini-Bid in accordance with the requirements set forth in the How to Use this Contract document.
- E-mail addresses for all awarded Contractors in each Lot can be found on the OGS website at:
 - <http://www.ogs.ny.gov/purchase/sr/award/notes/7360022772can.html>, by clicking on the "Mailing List by Lot" link on the PBITS main contract page.
 - The direct link to this document is <http://www.ogs.ny.gov/purchase/sr/award/notes/7360022772MailingListEmails.xlsx>.
 - See the tabs on the bottom of the document to access the E-mail addresses for each Lot.

1.4 IN-SCOPE PROJECTS

Project Based IT Consulting Services required by an Authorized User must be obtained via a Mini-Bid process under this Contract. The Authorized User shall issue a Mini-Bid with a SOW for the required Project Based IT Consulting Services. A Mini-Bid may include, but will not be limited to, projects requiring: analysis, data classification, design, development, testing, quality assurance, security and associated customized training for IT based applications.

Additional examples of in-scope projects include, but are not limited to:

Version: 05022016



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STATE OF
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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	Secondary Contact: Insert First and Last Name
E-mail address: Insert E-Mail Address	E-mail address: Insert E-Mail Address
Authorized User shall indicate if Procurement Lobbying Law/Restricted Period is in effect: <input type="checkbox"/> Yes <input type="checkbox"/> No <i>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:</i> http://www.oqs.ny.gov/aboutOqs/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



Mini-Bid Template (continued)

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).)



Mailing Lists By Lot - Designated Email Addresses

Updated 5/4/2016

LOT 1 DESIGNATED EMAIL ADDRESSES

LOT 1 Contractor	Designated Email	MBE/WBE/SB
22nd Century Technologies, Inc.	govt@tscti	
Abator Information Services	andrew@abator.com	
Aeon Nexus Corporation	kileywittig@aeonnexus.com	
Ardent Technologies, Inc.	amandabrown@ardentinc.com	
LOT 2 DESIGNATED EMAIL ADDRESSES		
LOT 2 Contractor	Designated Email	MBE/WBE/SB
ATRIA Consulting, LLC	mbordman@atriaconsulting.com	
Bowne Management Systems, Inc.	gcakmak@bownegroup.com	
Business Logic	blogic@businesslogic.com	
Cogent Technologies, Inc.	ogs@doni@cogent.com	
Compulink Technologies Inc.	denise@compulink.com	
Currier, McCabe & Assoc. (CMA)	proposals@currier.com	
Derive Technologies	info@derive.com	
Digits LLC	james.don@digits.com	
DIRAD Technologies, Inc.	govadmin@dirad.com	
Documentation Strategies, Inc.	Tami.cole@documentation.com	
Donia & Associates LLC	ogs@doni@donia.com	
ECC Technologies Inc.	jenstarks@ecc.com	
ExperSolve, Inc.	steve.smit@experimentsolve.com	
Garnet River, LLC	pgasparini@garnetriver.com	
GCOM Software, Inc.	julie@gcom.com	
Genesys Consulting Services Inc.	pbits@genesys.com	
IIT, Inc.	gov@iit-inc.com	
Compulink Technologies Inc.	denise@compulink.com	MBE/SB
Counterpointe Solutions, Inc.	mpuckett@cpoinete.com	
CRGT Inc.	gamal.hossack@salientcrgt.com	
CSG Government Solutions, Inc.	rfp@csgdelivers.com	

Updated 5/4/2016

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.	gamal.hossack@salientcrgt.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@gcom.com	MBE
HP Enterprise Services, LLC	Val.koricki@hp.com	
International Business Machines Corp.	milvaney@us.ibm.com	
KPMG LLP	golante@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	



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 PARTICIPATION	OGS CONTRACT NUMBER	CONTRACTOR INFORMATION		CONTRACT SPECIFICS
LOT 1 LOT 2 LOT 3	PB200AA MBE	22 nd Century Technologies, Inc. 1 Executive Drive, Suite # 285 Somerset, NJ 08873 888-998-7284	FED ID# 223502121 NYS Vendor ID# 1000020035	Contact Information Price List Terms & Conditions
<p align="center"><i>CONTRACT PERIOD : September 25, 2015 – September 8, 2018</i></p>				



Contractor Insurance Information

Contractor Name	Lot 1	Lot 2	Lot 3	Commercial General Liability	Business Automobile Liability	Umbrella	Technology Errors and Omissions	Crime	Workers' Compensation	Disability Benefits
Donia & Associates, LLC	X	X		7/16/2016	Attestation	Not Applicable	Time of First Transaction	7/16/2016	9/19/2016	3/17/2017
DynTek Services, Inc.		X		10/1/2016	Attestation	10/1/2016	10/1/2016	10/1/2016	10/1/2016	5/4/2016
e.nfrastructure Technologies, Inc.		X		5/3/2016	5/3/2016	5/3/2016	Time of First Transaction	Time of First Transaction	5/3/2016	1/1/2017
ECC Technologies Inc.	X	X		11/7/2016	11/7/2016	11/7/2016	Time of First Transaction	Time of First Transaction	11/7/2016	12/31/2016
EMC Corporation		X		11/1/2016	11/1/2016	11/1/2016	11/1/2016	11/1/2016	11/1/2016	7/15/2016
Environmental Systems Research Institute, Inc.		X		12/15/2016	12/15/2016	12/15/2016	12/15/2016	12/15/2016	12/15/2016	7/1/2016
Ernst & Young LLP		X		6/1/2017	6/1/2017	6/1/2017	Time of First Transaction	Time of First Transaction	8/1/2016	12/31/2016
ExperSolve, Inc.	X			7/24/2016	Attestation	Not Applicable	7/24/2016	Time of First Transaction	1/1/2017	6/30/2016
First Data Government Solutions, LP		X	X	1/1/2017	1/1/2017	1/1/2017	3/31/2016	3/31/2016	9/8/2018	9/8/2018
Fountains Spatial, Inc.		X		10/1/2016	Attestation	10/1/2016	Time of First Transaction	Time of First Transaction	7/1/2016	8/16/2016
Garnet River, LLC	X	X		7/15/2016	Attestation	7/15/2016	Time of First Transaction	Time of First Transaction	7/15/2016	5/31/2016
Gartner Inc.		X	X	6/30/2016	6/30/2016	6/30/2016	6/30/2016	7/13/2016	6/30/2016	12/31/2016
GCOM Software Inc.	X	X	X	1/1/2017	Attestation	1/1/2017	1/1/2017	1/1/2017	1/1/2017	12/31/2016
Genesys Consulting Services, Inc.	X	X		12/31/2016	Attestation	12/31/2016	12/31/2016	1/15/2017	12/31/2016	12/31/2016
Geographic Information Services, Inc		X		3/25/2017	Attestation	3/25/2017	Time of First Transaction	3/25/2017	3/25/2017	12/26/2016
Grant Thornton LLP		X		7/31/2016	Attestation	7/31/2016	5/1/2016	7/31/2016	3/1/2017	6/9/2016
Greenman-Pedersen, Inc.		X		12/31/2016	12/31/2016	12/31/2016	6/30/2016	12/31/2016	12/31/2016	1/1/2017
HLN Consulting, LLC		X		12/7/2016	Attestation	12/7/2016	12/7/2016	1/15/2017	9/8/2018	9/8/2018
HP Enterprise Services, LLC		X	X	9/30/2016	9/30/2016	9/30/2016	9/30/2016	4/1/2017	9/30/2016	9/9/2018
IIT Inc.	X	X		8/13/2016	Attestation	Not Applicable	Time of First Transaction	8/13/2016	6/27/2016	9/30/2016
ImageWork Technologies Corp.	X	X		12/1/2016	Attestation	Not Applicable	4/3/2016	12/4/2016	4/3/2017	12/31/2016
Infor Public Sector, Inc.		X		11/30/2016	11/30/2016	11/30/2016	Time of First Transaction	11/30/2016	11/30/2016	12/31/2016
Information Builders, Inc.		X		3/9/2017	Attestation	3/9/2017	Time of First Transaction	10/14/2016	3/9/2017	6/30/2016
Information Methods Incorporated	X	X		6/16/2016	Attestation	6/16/2016	Time of First Transaction	Time of First Transaction	2/9/2017	1/4/2017
Information Resource Group, Inc		X		1/15/2017	1/15/2017	1/15/2017	8/22/2016	Time of First Transaction	8/20/2016	9/30/2016
Infosys International, Inc.	X	X		10/31/2016	10/31/2016	Not Applicable	Time of First Transaction	Time of First Transaction	10/31/2016	12/15/2016
innoSoul, Inc.	X			10/14/2016	Attestation	Not Applicable	Time of First Transaction	Time of First Transaction	9/20/2016	2/24/2017
International Business Machines Corporation		X	X	5/21/2016	5/21/2016	Not Applicable	11/1/2016	6/30/2016	1/1/2017	9/8/2018

Remember: We're Here to Help

PBITS Contact

pbits.authorizedusers@ogs.ny.gov



Helpful Resources

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

Questions

Supplemental Information

Develop Project Documents – Gantt Chart

The initial plan should include a **Gantt Chart** of all go/no go points, sign off points, agency staff responsibilities, and prerequisites.



Example: A Scope of Work

An agency has ZYX database containing input from the last 10 years with approximately 8 million pieces of data. This data is broken in to tables with multiple variables. This project is to convert the data in to a new format based the agency's new platform. As part of this process it is expected the contractor to perform data consolidation and verification and place data validation measures on the specific fields in question. Current error rate in data is 63%. It is expected the new data set will contain no more than 1% error. It is expected the contractor will carry this work out within the continental United States (CONUS) at their own facilities using their own staff. Data verification issues will be brought to Joe Blank by email for resolution. This project must be complete by 1/1/2017.



Example: A Closer Look

Size of the project: An agency has ZYX database containing input from the last 10 years (approximately 8 million pieces of data) broken in to tables with multiple variables.

What overall success looks like: This project is to convert the data in to a new format based on the our new platform.

Risk: As part of this process it is expected the contractor to perform data consolidation and verification and place data validation measures on the specific fields in question. Current error rate in data is 63%.

Expectation: It is expected the new data set will contain no more than 1% error.

Resources: It is expected the vendor will carry this work out within the continental United States (CONUS) at their own facilities using their own staff.

Risk Mitigation: Data verification issues will be brought to Joe Blank by email for resolution.

Timeframe: This project must be complete by 1/1/2017.



Develop Project Documents - Timeline

- To get what you need, when you need it, **create a project timeline.**
- Your project timeline may include the following events:
 - Award date
 - Kick-off meeting (where data is exchanged)
 - Planning meeting (contractors give you their plan)
 - Plan approval with corrections
 - Full analysis of data with plan of correction
 - Data correction verified
 - Design of new data format is complete
 - Conversion into the new format is complete and verified
 - Data has been loaded into the new database without error



Payment Schedule

- Consider using payment **withholdings** as deliverables are accepted (also known as **retainage**).
 - If you want to do this the percentages of how much you will pay must be included in the mini-bid as well as details about when it will be released.
 - Note: The maximum withholding amount is **20%** for each deliverable.
- Consider including an incentive that if a contractor exceeds expectations by providing acceptable deliverables early, the payment of retainage will occur sooner.

Retainage Example

The State will hold back 10% of each implementation deliverable payment as retainage. This retainage shall apply only to implementation deliverables (year 1 deliverables). Upon completion of all implementation deliverables to the satisfaction of the State, all retainage withheld will be paid to the Contractor in full, subject to the terms and conditions of the contract. Contractor invoices shall reflect the total billed, total retainage and total due. Final implementation deliverable invoice shall reflect billing for all retainage and all retainage withheld.

Collect Mini-Bid Participation Interest Forms

- Consider surveying the contractors for interest in the project by using the optional **Mini-Bid Participation Interest Form** – helps narrow the bidder pool.
 - Find the form online:
www.ogs.ny.gov/purchase/snt/awardnotes/7360022772TemplatePage.pdf

Mini-Bid Participation Interest Form

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Project Based Information Technology Consulting Services (Statewide) Page 1 of 2

MINI-BID PARTICIPATION INTEREST

An Authorized User must read and understand the How to Use this Contract document, before using this form. Any substantial deviation in an Authorized User's released Mini-Bid from the descriptions provided to the Contractors through this Mini-Bid Participation Interest Form invalidates these results. Use this form only after project scoping and procurement strategy has been finalized. This is a non-mandatory process. This form must be sent to all Contractors in the applicable Lot. Contractors will send responses to the E-Mail included in the form below by the date and time indicated.

Lot Number	Estimated Project Value Range
Lot 1 Limited to NYS MWBEs, NYS SDVOBs, and NYS SBs	Up to \$200,000
Lot 2	\$200,001 - \$7,500,000
Lot 3	\$7,500,001 - \$25,000,000

PROJECT INFORMATION

TITLE: _____

Mini-Bid Number: _____ Response Due Date: _____ Time: _____

E-Mail to Return Responses to: _____

Lot Being Solicited: Lot 1 (up to \$200,000) limited to MWBE, SDVOB, and SB Lot 2 (\$200,001-\$7,500,000) Lot 3 (\$7,500,001 - \$25,000,000)

PROJECT DESCRIPTION

This section sets forth specific information about the proposed project and must include information about the general type of work, estimated timeline and any specific skill sets needed (such as specific programming language or PJI method). The Authorized User may include an estimated value of the project or a not to exceed amount. The Authorized User must carefully assess the estimated value in order to properly determine which Lot is applicable. Failure to survey the correct Lot invalidates the survey results.

Brief Project Description

Location of Work to be Performed: _____

General Category of Work (for example, systems integration, programing, security analysis or IV&V):

AUTHORIZED USER CONTACT INFORMATION

Authorized User Name _____		Address _____	
Contact Name _____	Title _____	E-Mail _____	

A New York Governmental Entity shall indicate if Procurement Lobbying Law/Restricted Period is in effect:
 Yes No

Version: 05022016

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CONTRACTOR RESPONSE

Responses are limited only to awarded Contractors of Solicitation 22772 and of the Lot being solicited. Contractors are cautioned that failure to respond to this participation interest request by the response due date or an answer of 'No' in this section will remove their organization from the list for all future communications from the Authorized User regarding this Project.

OGS Contract No. _____ Contractor Name

Contact Name _____	Phone Number _____	E-Mail _____
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My Company is interested in participating in this Mini-Bid: Yes No
If No, Please offer a reason: _____

Version: 05022016

Change Your Project Budget or Duration

Here's how you can make adjustments to your PBITS project.

Increasing Project Budget

- Called a budget enhancement, you can include a 10% increase in project budget.
- Remember that the total project costs cannot exceed the lot.
- Use the Enhancement Request Template to make this change.

No Cost Change Requests

- You may amend your scope of work if it does not change the deliverable at no cost to you.
- Can be used to you increase project duration. Remember the total duration must be 36 months or less.
- Use the No Cost Change Request Template to make this change.

Get the forms at:

[www.ogs.ny.gov/purchase/snt/awardnote
s/7360022772TemplatePage.pdf](http://www.ogs.ny.gov/purchase/snt/awardnotes/7360022772TemplatePage.pdf)



**Purchasing Forum
& Trade Show**

Enhancement Request (Project Budget)

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Enhancement Request Template

Enhancements refer to additional functionality and deliverables unknown to the Authorized User at the time of Mini-Bid release. An Authorized User is permitted to include an enhancement budget, as included in the Mini-Bid (up to 10%). The total cost of the project, including the enhancement budget, shall not exceed the Lot threshold from which the award was made. Written approval is required from both the Contractor and the Authorized User for the enhancement request.

INITIATOR OF PROPOSED ENHANCEMENT			
Name	Project Role	Phone Number	E-Mail
Project Title	Request Date		

DESCRIPTION OF PROPOSED ENHANCEMENT
Description of Proposed Enhancement
Reason for Enhancement and Impact of Not Making Enhancement

CONTRACTOR RESPONSE	
Deliverable Description	Proposed Cost (Contractor Must Provide Supporting Documentation)
Contractor Description of Proposed Enhancement	
Complexity	
Impact on Operations	

CONTRACTOR ENHANCEMENT REQUEST REVIEW				
Name	Role	Recommendation (Approved/Rejected)	Signature	Date

Proposed Change is Approved Rejected by Contractor

Signature: _____ Title: _____
 Printed Name: _____ Date: _____

Comments (Add attachments as necessary)

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AUTHORIZED USER ENHANCEMENT REQUEST REVIEW				
Name	Role	Recommendation (Approved/Rejected)	Signature	Date

Proposed Change is Approved Rejected by Authorized User

Signature: _____ Title: _____
 Printed Name: _____ Date: _____

Comments (Add attachments as necessary)

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No Cost Change Request

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No Cost Change Order Request Template

The Authorized User reserves the right to reasonably amend a Fixed-Price Deliverable, without a cost increase, provided the Amendment does not materially change the scope of the Deliverable. Although the Authorized User has endeavored to identify the many tasks associated with a Fixed-Price Deliverable (Tasks), additional Tasks which can reasonably be anticipated to carry out the Deliverable shall be within the scope of the Deliverable, and shall not result in a cost increase. Written approval is required from both the Contractor and the Authorized User regarding the no cost change order.

INITIATOR OF PROPOSED CHANGE			
Name	Project Role	Phone Number	E-Mail
Project Title	Request Date		

DESCRIPTION OF PROPOSED CHANGE

Description of Proposed Change

Reason for Change and Impact of Not Making Change

CONTRACTOR RESPONSE

Complexity

Impact on Operations

CONTRACTOR NO COST CHANGE REVIEW				
Name	Role	Recommendation (Approved/Rejected)	Signature	Date

Proposed Change is Approved Rejected by the Contractor

Signature: _____ Title: _____
 Printed Name: _____ Date: _____

Comments (Add attachments as necessary)

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AUTHORIZED USER NO COST CHANGE REVIEW				
Name	Role	Recommendation (Approved/Rejected)	Signature	Date

Proposed Change is Approved Rejected by the Authorized User

Signature: _____ Title: _____
 Printed Name: _____ Date: _____

Comments (Add attachments as necessary)

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