Contract Instructions

Contracts for IT Security Related Services

1. Go to http://purchasing.idaho.gov/statewide_contracts.html

2. Scroll to Security-Related Services.

3. See the PowerPoint in the "IT Security Related Services Breakout and Pricing" link for:
    i. A list of Contractors and Contract Numbers along with the service Categories under each of those Contracts.
    ii. Pricing is listed in this document.
    iii. Contractor contact information is shown on the last slide.

4. **IMPORTANT(!):** These Contracts were awarded as a multiple award, and agencies **MUST follow I.C. § 67-9211(3)** when making decisions as to from which contract to purchase.

5. **Using the IT Security Related Services Contracts**

Step 1 – Determining the IT Security Related Service Category Required

1.1 Access the Division of Purchasing (DoP) statewide contracts website at the following link. http://purchasing.idaho.gov/statewide_contracts.html

1.2 Click on the "Contract Solicitation" link under the Contract Description "Security-Related Services", and see the information in sections 5.1.2.11 (Resume Qualifications) and in Attachment 4 (Service Categories and Bid Schedule). In Attachment 4 there's a statement made under each Service Category giving a basic description of the function of the Service Category.

   (NOTE: Service Categories 2 and 4 were not awarded from Invitation to Bid Number ITB17000478, so, ignore information about those Service Categories.)

From these sections, determine what IT Security Related Service is needed.

Step 2 – Determining Contractors per IT Security Related Service Category

2.1 See the "IT Security Related Products Breakout and Pricing" link under the Contract Description "Security-Related Services". This document lists the four Contractors, and each Service Category for which they received an award.

2.2 Each of the Contractors for the Service Category you need must receive a Project Service Order (PSO) (Step 3).

(The following is a concise list of Service Categories and Contractors:

   Category 1, Information Security Analyst Senior

Award to: DevCare Solutions
Award to: SeNet International Corporation
Award to: CRI Advantage, Inc.

Category 3, Senior Information Security Engineer
Award to: DevCare Solutions
Award to: SeNet International Corporation
Award to: CRI Advantage, Inc.

Category 5, Information Security Training Analyst
Award to: DevCare Solutions
Award to: SeNet International Corporation
Award to: NuHarbor Security)

Step 3 – Project Services Order (PSO)

3.1 Under the Contract Description "Security-Related Services", locate the "Project Service Order Form" link in the first column and open the Excel file. The PSO is the contractual document you must use to communicate your IT Security Related Service need to the Contractors.

3.2 It is recommended that you read and familiarize yourself with the entire PSO template prior to completing the "Agency Defined IT Security Related Services Requirement" portion of the PSO. The PSO is divided into an "Agency Defined IT Security Related Services Requirement" section, a "Contractor Response" section, and a section to complete one a Contractor is selected.

3.3 Complete the "Agency Defined IT Security Related Services Requirement" portion of the PSO. You will assign the PSO a unique identifier in the following steps. It is recommended that the user electronically save this PSO using the PSO identifier as the file name or part of the file name.

The following fields on the PSO require agency information:

Response Due By Date: Provide the Contractors a response by date. This is the date that you require a PSO response from the Contractors offering the IT Security Related Services resource required by your PSO request. For complex requirements, you may want to give them more time to review your PSO and respond.

Agency Name: Enter the name of your agency.

Division: Provide the Contractors the name of your division if you belong to a particular division within your agency.

PSO Identification Number: This is a unique identifier for the PSO that you assign. An example is "PSO160220" which is simply year, month, day. It can and should be something that assists you in identifying the PSO and linking it to a specific IT Security Related Services need.

Agency Contact Name: Provide the Contractors an agency contact name that can assist them with any questions that may arise regarding the PSO.

Contact Phone Number: Provide the Contractors the agency's contact phone number.

Contact Email Address: Provide the Contractors the agency's contact email address.

Service Category: Provide the Contractors the IT Security Related Service Category from which the required IT Security Related resource is needed from (Category 1, Category 3, or Category 5.)

Service Required: RESERVED

Temporary Augmented Staffing Resource: Check this box if the required IT Security Related resource is being used to supplement agency IT staff. Reference APPENDIX A SPECIAL TERMS AND CONDITIONS, § 1.5 of the Contract for a definition.

Temporary IT Project Staffing Resource Check this box if the required IT Security Related resource is needed for a specific IT Security Related project. Reference APPENDIX A SPECIAL TERMS AND CONDITIONS, § 1.6 of the Contract for a definition.

Estimated Start Date: Provide the Contractors an estimated start date (need date) for the IT Security Related resource.

Estimated Completion Date: Provide the Contractors an estimated end date (termination of IT resource date) for the IT Security Related resource.

Estimated Total Hours: Provide the Contractors the estimated total hours the IT Security Related resource will be needed. If the IT Security Related resource is needed as a temporary IT Security Related project staffing resource, the Estimated Total Hours will like be tied to a specific IT Security Related project. If the IT Security Related resource is needed for temporary augmented staffing, the Estimated Total Hours will be an estimate of the total hours the agency expects to need augmented staffing.

To avoid co-employment claims, whether for temporary augmented staffing or for temporary IT Security Related project staffing, DOP recommends that any one particular IT person assigned to a PSO not exceed an 18-month deployment, or approximately 3,200 total hours.

Agency Project Scope: Provide to the Contractors the scope of the IT resource deployment. Provide a sufficient scope of the IT Security Related work needed for the Contractors to reasonably respond to the PSO.

Agency Expected Deliverables: Provide to the Contractors what you expect the IT resource to deliver to your agency in the way of IT Security Related service. If there are particular delivery dates for the deliverables, provide those to the Contractors. This may be in the form of a draft project schedule.

Specific Skill Required: If there are specific skills required by the IT Security Related resource in addition to what the Contract requires of the specific IT Security Related Service you are seeking, list those here.

Step 4 – Issuing the PSO

4.1 The completed PSO must be emailed **to all of the Contractors for the IT Security Related Service Category listed on the PSO**. Use the information referred to in Sections 1 and 2 above to identify the Contractors for the IT Security Related Service Category to list on the PSO.

4.2 Attach a copy of your completed PSO to the email, and send to the Contractors. Ensure that all the information identified in 3.3 above is included in "Agency Defined IT Security Related Services Requirement" portion of your PSO.

Note: An ordering agency may not pick and choose the Contractors to which the agency will send the PSO. All the Contractors under an IT Security Related Service Category MUST be emailed the PSO. Additionally, ordering agency may not preselect a known IT Security Related resource, and "shop" a Contractor to subcontract the IT Security Related resource.

In no instance shall an ordering agency give less than 5 full business days for the Contractors to respond.

Step 5 - EVALUATION
(An evaluation template appears at the end of the PSO template. Agencies may use this template or one of their choice as long as the evaluation clearly shows compliance with IC § 67-9211(3).)

5.1 Once PSO responses are received from the Contractors, the ordering agency must perform an evaluation on the responses that supports Idaho Code § 67-9211(3). IC § 67-9211(3) requires State agencies using multiple award contracts to evaluate the use of multiple award contractors based upon price, availability, support services, and delivery.

> **5.1.1 Price** - The Fully Burdened Maximum Hourly Rate bid by the Contractor. Price may also be the PSO PROPOSED TOTAL COST proposed by the Contractor as long as the HOURLY RATE PROPOSED and the PSO HOURS PROPOSED multiply out to equal the PSO PROPOSED TOTAL COST. See the "IT Security Related Products Breakout and Pricing" link under the Contract Description "Security-Related Services" for each Contractor's hourly rate. **Ordering agencies are to ensure that the Hourly Rate Proposed by the responding Contractors does not exceed the rates listed in that link. Ordering agencies are to report to the DOP Contact any pricing that is above those rates.** PSO responses received where the Contractor's Hourly Rate Proposed is above the rate listed in the "IT Security Related Products Breakout and Pricing" link under the Contract Description "Security-Related Services" are not to be evaluated or considered. DOP will nullify any PSO whose Hourly Rate Proposed is above the rate listed in the "IT Security Related Products Breakout and Pricing" link under the Contract Description "Security-Related Services".

> **See APPENDIX A SPECIAL TERMS AND CONDITIONS, § 22 (Travel Required to Provide Services) of the Contract regarding a rate that the Contractor may charge for travel. Ordering agencies are also to report to DOP regarding any Contractor charging for travel where the Contract does not allow for it.**

> **5.1.2 Availability -** The proposed IT Security Related resource is available and the agency does not have to wait for the resource to finish other projects before becoming available.

Another aspect of availability might be the number of other IT projects the offered IT Security Related resource is committed to by the Contractor. An example would be a State IT Security Related Services Contractor who has taken on enough State work for an offered IT Security Related resource that the resource struggles to meet the various agencies' deadlines. This evaluation criterion can be considered a **pass/fail** requirement. Should a PSO response fail to meet this criterion, no further consideration need be given the response. The ordering agency is to fully document the reason for failing the Contractor's response.

5.1.3 Support Services - The proposed IT Security Related resource possesses the IT Security Related skills required by the PSO. This evaluation criterion can be considered a **pass/fail** requirement. Should a PSO response fail to meet this criterion, no further consideration need be given the response. The ordering agency is to fully document the reason for failing the Contractor's response.

5.1.4 Delivery - The Contractor's solution in the completed PSO meets the required delivery dates of the agency as specified in the PSO. This evaluation criterion can be considered a **pass/fail** requirement. Should a PSO response fail to meet this criterion, no further consideration need be given the response. The ordering agency is to fully document the reason for failing the Contractor's response.

To assist the ordering agency in meeting IC § 67-9211(3), an evaluation template appears at the end of the PSO form.

Agencies should consider that all Contractors were evaluated and Contracts awarded based upon their ability to provide qualified technical resources. As such, the PSO offering the lowest PSO Proposed Total Cost price is to receive the highest score for Price. The Price portion of any evaluation should be weighted highly as a percentage of total evaluation points. DOP recommends a 70 – 90% weighting. DOP further recommends that agencies take full advantage of any in-house purchasing expertise that would help to develop an evaluation that would result in a reasonable valued award meeting the requirements of IC § 67-9211(3). All PSO evaluations must show evidence that the ordering agency sought compliance with IC § 67-9211(3) and performed a fair evaluation of all responses.

Note: Evaluations are to list all the Contractors receiving contracts (SBPOs) for the IT Security Related Service Category being evaluated. For those Contractors failing to respond to the PSO request, enter "Failed to Respond" on the Contractor's evaluation line. For those who responded that they had no available resource, please enter "Failed to Provide a Resource" on the Contractor's evaluation line. DOP will take these failures into account during any renewal period. Some Contractors may not have their Contracts renewed based upon failing to respond or to provide resources.