

INSTRUCTIONS FOR USING THE IT SERVICES CONTRACTS

Using the IT Contracted Services Contracts

Step 1 – Determining the IT Service Category & Subservice 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 Scroll down to the section INFORMATION TECHNOLOGY & SOFTWARE MASTER LICENSE AGREEMENTS and locate the subsection IT SERVICES CONTRACTS. IT contracts are sorted by name. This is a rather long webpage. The quickest way to find the IT Contracted Services links is to press Ctrl/F (the Ctrl key along with the ‘F’ key) and when the Find input field displays, type in “IT Services” and click “Next” to the right of the Find input field.

1.3 Locate the “IT Service Categories and Subservice Descriptions” link in the first column and open the Word file. This file lists the IT Service Categories available to agencies for fulfilling IT service needs. Those IT Service Categories are as follows.

- **IT Service Category 1** – Application Support;
- **IT Service Category 2** – Network and Infrastructure Support;
- **IT Service Category 3** – Project and Process Management;
- **IT Service Category 4** – Other Required IT Services. Within this Category 4 are the following IT subservices.
 - † Technical Writer;
 - † IT Security Specialist;
 - † Data Entry Operator;
 - † GIS Programmer/Analyst;
 - † Web Developer.

Within Service Categories 1 – 3 are IT subservice categories listing various experience level requirements. IT Experience level requirements are also listed in IT Service Category 4 for the “Other Required IT Services” listed there.

From this file, determine what IT subservice is needed and the required education/experience level. For example, if you need a Database Administrator, there are three education/experience levels listed. Those levels are DBA1, DBA2, and DBA3. Each level describes the Years of Relevant Experience, Preferred Education, and Role Description. Determine the education/experience level needed and select the proper identifier (DBA1, DBA2, DBA3). Make note of the IT Service Category needed, subservice, and education/experience level needed for you will need it for step 2.

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Step 2 – Determining Awarded Contractors per IT Service Category

2.1 Under the IT SERVICES CONTRACTS on DoP’s contracts website and in column one, locate the “IT Services Contracts Award by Category & Pricing” link in the first column and open the Excel file. This link will appear underneath the link referred to in 1.3. There are five tabs to this Excel file.

- **Contractor List;**
- **Category 1** (IT Service Category 1: APPLICATION SUPPORT);
- **Category 2** (IT Service Category 2: NETWORK AND INFRASTRUCTURE SUPPORT);
- **Category 3** (IT Service Category 3: PROJECT AND PROCESS MANAGEMENT);
- **Category 4** (IT Service Category 4: OTHER REQUIRED IT SERVICES).

The file should automatically open to the “Contractor List” tab. If it does not, you will need to click on the “Contractor List” tab.

This tab lists all the contractors holding a State open contract for providing IT services. Those authorized to provide IT Service Category 1 services will contain an ‘X’ within a **Green** background underneath the “Cat 1” column. There are 14 contractors who are contracted to provide IT Service Category 1 services. This identification technique (‘X’ within a **Green** background) is used to identify the contractors authorized for providing services within all four IT Service Categories.

2.2 Using the IT Service Category you identified in Step 1, locate the IT Service Category on the Contractor List. Each of the contractors with an ‘X’ under the needed IT Service Category must receive a Project Service Order (PSO) (Step 3).

Step 3 – PROJECT SERVICE ORDER

3.1 Under the IT SERVICES CONTRACTS on DoP’s contracts website and in column one, locate the “Project Service Order Form” link in the first column and open the Excel file. This link will appear underneath the link referred to in 2.1. The PSO is the contractual document you must use to communicate your IT service need to the approved contractors. These are the contractors you identified in 2.2 above.

3.2 It is recommended that you read and familiarize yourself with the entire PSO template prior to completing the “Agency” portion of the PSO. The POS is divided into an “Agency” section, a “Contractor” Section, and a “Post Award Authorizing Signature” section.

3.3 Complete the “Agency” 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 resource required by your PSO request. If no date is entered, the contractors must respond within five (5) full State work days. For complex IT project support, you may want to give them more time to review your PSO and respond by entering a specific response date.

Agency Name: - enter the name of your agency.

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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 identifying the PSO and linking it to a specific IT 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 Service Category that the required IT resource is needed from (Category 1, Category 2, Category 3, or Category 4.)

Subservice Required: - provide the contractors the IT Subservice required. For example, DBA3 (Database Administrator Level 3), NA2 (Network Administrator Level 2, WD1 (Web Developer Level 1), etc.

Temporary Augmented Staffing Resource - check this box if the required IT resource is being used to supplement agency IT staff. Reference APPENDIX A SPECIAL TERMS AND CONDITIONS, § 1.5 of the master contract for a definition.

Temporary IT Project Staffing Resource - check this box if the required IT resource is needed for a specific IT project or solution. Reference APPENDIX A SPECIAL TERMS AND CONDITIONS, § 1.5 of the master contract for a definition.

Estimated Start Date: - provide the contractors an estimated start date (need date) for the IT resource.

Estimated Completion Date: - provide the contractors an estimated end date (termination of IT resource date) for the IT resource being sought.

Estimated Total Hours: - provide the contractors the estimated total hours the IT resource will be needed. If the IT resource is needed as a temporary IT project staffing resource, the Estimated Total Hours will like be tied to a specific IT project. If the IT 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 project staffing, DoP *recommends* that any one particular IT person assigned to a PSO not exceed an 18-month deployment, or approximately 3200 total hours.

Agency Project Scope: - provide to the contractors the scope of the IT resource deployment. Provide a sufficient scope of the IT 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 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 resource in addition to what the contract requires of the specific IT subservice you are seeking, such as SCRUM skills or particular programming language skills, list those here.

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Step 4 – ISSUING THE PROJECT SERVICE ORDER

4.1 The completed PSO must be emailed **to all the approved contractors for the IT SERVICE CATEGORY listed on the PSO.** Use the file referred to in 2.1 above and the “Contractor List” tab to identify the approved contractors for the IT SERVICE CATEGORY you listed on the PSO. The contractors appear under the IT Service Category with an ‘X’ within a **Green** background. The email address is listed for each contractor. It is recommended that the ordering agency send a single email to themselves, with the awarded contractors listed in the cc or bcc field of the email. **At the bottom of the contractor list, email addresses by IT Service Category have been listed for the convenience of copying and pasting into an email.**

4.2 Attach a copy of your completed PSO to the email, and send to the contractors. Ensure that all the information listed in 3.3 above is included in agency section of your PSO.

Note: An ordering agency may not pick and choose which contractors to send the PSO to. All the contractors under an IT Service Category, or in the Case of Category 4, the contractors under a specific subservice, MUST be emailed the PSO.

An ordering agency may not preselect a known IT resource, and “shop” an awarded contractor to subcontract the IT resource to.

Contractors have five (5) State working days to respond to the PSO unless the ordering agency enters a date within the “Response Due by Date” on the PSO allowing additional time. In no instance shall an ordering agency give less than 5 full State working days for the contractor to respond. The five working days begins the next State working day after the PSO has been emailed to the contractor.

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 § 67-5718A (3).)

5.1 Once PSO responses are received from the contractor, the ordering agency must perform an evaluation on the responses that supports Idaho Code § 67-5718A(3) ACQUISITION OF PROPERTY BY CONTRACT – AWARD TO MORE THAN ONE BIDDER – STANDARDS FOR MULTIPLE AWARDS Subsection (3). IC § 67-5718A(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 or the unburdened Fully Burdened Maximum Hour Rate proposed by the contractor. Price may also be the PSO PROPOSED TOTAL COST proposed by the contractor as long as the HOURLY SERVICE RATE PROPOSED and the PSO HOURS PROPOSED multiply out to equal the PSO PROPOSED TOTAL COST. The Excel file referred to in 2.1 above contains the Fully Burdened Maximum Hourly Rates contracted per IT SERVICE CATEGORY and awarded contractor.

Ordering agencies are to ensure that the Hourly Service Rate Proposed by the responding contractors does not exceed the Fully Burdened Maximum Hourly Service Rates listed in the file.

Ordering Entities are to report to the State’s IT Purchasing Officer any pricing that is above the posted Fully Burdened Maximum Hourly Service Rate. PSO responses received where the contractor’s offered Hourly Service Rate is above the posted Fully Burdened Maximum Hourly Service

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Rate, are not to be evaluated or considered. The Division will nullify any PSO whose Hourly Service Rate is above the posted Fully Burdened Maximum Hourly Service Rate.

It is a condition of the contract that the contractor unburden their Fully Burdened Maximum Hourly Service Rate for a proposed IT resource traveling 30 miles or less to the ordering agency to provide the service. Proposals received showing a travel distance of 30 miles or less, but no evidence of the Fully Burdened Maximum Hourly Service Rate being unburdened, should be challenged and the contractor's reasoning for not offering a reasonable unburdening of the Fully Burdened Maximum Hourly Service Rate. As documentation, agencies may ask the contractor to provide an itemization of the proposed Hourly Service Rate showing how the Fully Burdened Maximum Hourly Service Rate was unburdened.

Ordering Entities are also to report any contractor charging the Fully Burdened Maximum Hourly Service Rate where the travel required by the offered IT resource is 30 miles or less to the ordering agency;

5.1.2 Availability - the proposed IT resource is available and the agency does not have to wait for the resource to finish other IT projects before becoming available. Another aspect of availability might be the number of other IT projects the offered IT resource is committed to by the contractor. An example would be a State IT services contractor who has taken on enough State work for an offered IT 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, not further consideration need be given the response. The ordering agency is to fully document the reason for failing the contractor response;

5.1.3 Support Services - the proposed IT resource possesses the IT skills required by the PSO. This evaluation criterion can be considered a **pass/fail** requirement. Should a PSO response fail to meet this criterion, not further consideration need be given the response. The ordering agency is to fully document the reason for failing the contractor response;

5.1.4 Delivery - the proposed contractor solution 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, not further consideration need be given the response. The ordering agency is to fully document the reason for failing the contractor response.

To assist the ordering agency in meeting IC § 67-5718A (3), a simple 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 offer 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 § 67-5718A (3). All PSO evaluations must show evidence that the ordering agency sought compliance with IC § 67-5718A (3) and performed a fair evaluation of all responses.

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Note: Evaluations are to list all the contractors receiving contracts (SBPOs) for the IT Contract Services 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 will not have their contracts renewed based upon failing to respond or provide resources.

If no suitable IT resource was offered meeting the requirements of the PSO, reference 5.2.9 below.

5.2 Once the evaluation of the PSO responses are completed by the ordering agency and a contractor has been selected, the agency is to do the following.

5.2.1 Notify all contractors providing a proposal responding to the PSO of the completion of the evaluation, and which contractor is being selected. It is recommended this be done by a single email containing all their email addresses. It is not necessary to notify those contractors not responding to the PSO.

5.2.2 **Using the PSO response provided by the winning contractor**, enter the “PSO NOT TO EXCEED AMOUNT” on the signature page of the PSO. **This dollar amount is to equal the “PSO Hours Proposed” by the contractor multiplied by the “Hourly Rate Proposed” by the contractor. This amount must agree with the “PSO Proposed Total Cost” proposed by the contractor.**

5.2.3 Enter the contractor’s Statewide Blanket Purchase Order (SBPO) in the “SBPO” number field in the footer of the PSO by double clicking in the field. That number is found on the Contractor List tab of the Excel file referred to in 2.1 above. To exit the footer, double click in the body of the document.

5.2.4 Have the contractor sign their PSO response in the PSO CONTRACTOR AUTHORIZING SIGNATURE section and provide the required information. Ordering agencies are **not to** sign prior to receiving the contractor’s authorizing signature;

5.2.5 In the AGENCY AUTHORIZING SIGNATURES section of the PSO, obtain the signature of the authorizing IT agent of the ordering agency and have them provide the required information;

5.2.6 In the AGENCY AUTHORIZING SIGNATURES section of the PSO, obtain the signature of the authorizing purchasing agent or by someone at the agency that is fiscally responsible for the expenditure and provide the required information.

NOTE: requiring this authorization is a new step to the PSO process. The PSO will not be considered to be effective if this authorizing signature does not appear on the PSO. Additionally, the PSO will not be considered effective if the signature is the signature of personnel of the ordering agency’s IT staff. This authorizing signature warrants that a fiscally responsible agent of the ordering agency has reviewed the evaluation and agrees that the evaluation complies with the requirements of IC § 67-5718A(3) for use of multiple contractors. This step should not be taken lightly. PSOs that are unsigned by this representative or signed by personnel from the ordering agency’s IT staff will be cancelled by DoP.

5.2.7 Email a scanned copy of the signed PSO and all supporting supplemental documents between yourself and the contractor, to the contractor.

5.2.8 Email a scanned copy of the signed PSO, any supporting supplemental documents, **and a copy of the evaluation** used to DoP at purchasing@adm.idaho.gov. **It is no longer necessary to email the**

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State IT Purchasing Officer the names of those contractors not responding to the PSO. That information will be evident from the evaluation listing the responders.

5.2.9 If all PSO responses fail the evaluation due to low scores or failing one of the criteria, the following steps are to be taken if the ordering agency still needs the IT service.

5.2.9.1 You will need to complete and forward to DoP a completed “EXEMPTION FROM AN OPEN (STATEWIDE) CONTRACT” form. This form can be found at http://purchasing.idaho.gov/templates_and_forms.html. This is a rather long webpage. The quickest way to find the form on the webpage is to press Ctrl/F (the Ctrl key along with the ‘F’ key) and when the Find input field displays, type in “exemption from” and click “Next” to the right of the Find input field. Provide the information requested by the exemption form. Obtain the required ordering agency signatures. Attach the PSO evaluation showing the responding contractors and evaluation scores. Scan, and email to purchasing@adm.idaho.gov. The Administrator of the Division of Purchasing will review your exemption request and determine if an exemption is warranted.

5.2.9.2 If an exemption is granted, you will need to follow proper purchasing policies and procedures for obtaining the required IT service, meaning that if the expected total life cycle cost for the IT service exceeds your delegated purchasing authority, DoP will have to competitively bid the service for you. If it is within your delegated purchasing authority, the service will have to be competitively bid unless the service is under \$10,000, or can meet the requirements of IDAPA 38.05.01.044.07.

5.2.9.3 If an exemption is not granted, the ordering agency will need to either award to the highest scoring contractor based upon the evaluation, reissue the PSO containing any required amendments identified by the Administrator, or determine the IT service is no longer required.