

Overview for Contract

Prior to utilizing this contract, the user should read the contract in its entirety.

CONTRACT DESCRIPTION

This contract is for fixed price, deliverables-based IT services projects.

The purchase of hardware, software and staff augmentation services are **NOT PERMITTED** under this contract.

Time and Materials (T&M) type services may be included as part of a deliverables-based project under the following circumstances:

1. The project involves updating and maintaining software,
2. The project involves a portion of work that has no definitive timeline or deliverable that can be realistically projected, and
3. The project involves the use of alternative maintenance or development that is not amenable to a deliverable-based format.

T&M type services cannot be greater than 40% of the original Purchase Order value.

Scroll down to see the ITQ Thresholds and required SDB information below.

CONTRACT INFORMATION

Contract Title	Master Information Technology (IT) Services Invitation to Qualify (ITQ) Contract		
Contract Number	4400004480 (parent - not used for ordering)		
Solicitation Number	4400004480		
Original Validity Period	July 1, 2009 - June 30, 2014		
Current Validity End Date & Renewals Remaining	12/31/9999 (See Amendment #3 to ITQ Terms & Conditions)		
Point of Contact	Janis Brown		
Contact Phone Number	717-346-3829		
Contact Email Address	janibrown@pa.gov		
Pcard Enabled	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
Pcard Accepted	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	
MDM	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	

PROCESS TO ORDER

Click on the link below to review the Invitation to Qualify (ITQ) process for Request for Quotes (RFQ):

[ITQ Process \(JAGGAER and Non-JAGGAER\)](#)

Click on the link below to search for qualified contractors in JAGGAER:

[JAGGAER Login](#)

Click on the link below to view the Statement of Work which includes a complete list of the IT Commodity Codes and Terms and Conditions:

[Statement of Work / Commodity Codes / Terms and Conditions](#)

Click on the link below to search for qualified contractors (Non JAGGAER users):

[ITQ Supplier Search](#)

ITQ PROCESS
(JAGGAER and Non-JAGGAER)

The following instructions apply to all projects against an Invitation to Qualify (ITQ). **All** projects estimated to cost **greater than a \$1,000,000** must follow the Competitive Sealed Proposals (i.e. Request for Proposals) process. The Competitive Sealed Proposals process can be found in [Part 1, Chapter 6, Section B](#) of the Department of General Services (DGS) Procurement Handbook.

GENERAL INFORMATION

A. INSTRUCTION:

1. Agencies under the Governor’s jurisdiction including Independent Agencies and State Affiliated Agencies, are eligible to participate in Commonwealth Invitation to Qualify (ITQ) procurements and contracts.
2. It is recommended that agencies consult with their Procurement Office to determine whether the agency is eligible to participate on certain individual ITQ’s;
3. Agency personnel that will issue solicitations are required to attend the RFQ JAGGAER functionality training sessions facilitated/conducted by the DGS Bureau of Procurement Training Team. Contact RA-PA-GSTraining@pa.gov for further information;
4. ITQ Request for Quotes (RFQ) are not advertised on the DGS eMarketplace website;
5. Agencies may request additional commodity codes to be added to an ITQ Contract by emailing the ITQ Contract Manager with the proposed category name, description of services, and requirements. The ITQ Contract Manager will review the request to determine the need of an additional category and respond back to the Agency with their determination;
6. The Terms and Conditions originally agreed upon and accepted at the onset of the Contract are the only terms and conditions. No additional terms and conditions are to be added to the Request for Quote by the agency and the suppliers cannot include additional terms and conditions in their quote or response to the RFQ; and
7. Agencies can find instruction to assist with the ITQ process on the [DGS Collab site](#). If you need further assistance, with the Collab site please contact the DGS, Training Team.

B. PROJECTS:

1. When estimating your project budget to determine the required method of solicitation, please be aware that if the pricing of the selected Contractor falls within a higher cost range and exceeds the threshold for the solicitation, a Purchase Order (PO) cannot be issued unless DGS approves a waiver in advance. Waiver requests shall be addressed to the ITQ Contract Manager. DGS may grant a waiver depending on the degree to which the pricing exceeds the threshold cost range

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and whether the agency estimated the project cost in good faith. If DGS does not grant a waiver, **the solicitation must be cancelled and reissued under the correct threshold procedures.** If a waiver is granted, the agency must attach the approved waiver to the Purchase Order.

2. Contractors may not subcontract more than 49% of the total spend for a project/purchase order unless DGS approves a waiver in advance. Waiver requests shall be addressed to the ITQ Contract Manager.

Exception:

IT Services. Contractor may subcontract any portion of the services to third parties.

Randolph Sheppard Retail Sales. Contractors may subcontract more than 49% of the total spend for a project/purchase order.

C. CONTRACT SPECIFICS:

1. **Consulting Services:** Before soliciting any Contractors for Actuarial, Accounting, Auditing and Financial Services, prior approval is required from the Office of the Budget (OB). Approval is obtained by completing the [Consulting Services ITQ Review Form](#) and emailing it along with a Scope of Work document to OB, Consulting Services @ RA-ConsultingSrvcs@pa.gov. Agencies should anticipate five (5) business days for the OB review process. The Auditor General (AG) has the first right of refusal for any Auditing Category projects. OB will forward the form to the AG for their review (no set timeframe for AG approval). Agencies must attach the approved form to any resulting PO.
2. **Creative Advertising and Audio Visual – Interactive Production Services:** Agencies must submit their procurement request to the Department of General Services, Bureau of Commonwealth Media Services (CMS) attention: Susan Rickens (srickens@pa.gov), CMS Marketing Director for review. The procurement request when submitted must include: a draft Statement of Work and estimated time-line for project completion. Please allow five (5) business days for review.

CMS will review the information presented and determine if CMS would provide the services to the Agency in-part, entirely, or if the Agency will procure the project via the ITQ process. If the project is delegated back to the Agency, CMS will assist the agency with finalizing the Statement of Work.

3. **Fuels, Tank Wagon Delivery:** Agencies are required to use the Commonwealth Purchasing Card as the ordering and payment method for all orders against this contract that are under the small no-bid threshold unless granted a waiver by the Department of General Services.
4. **IT Services:** Executive Order 2011-09 - Small Business Procurement Initiative (SBPI), executed on November 21, 2011, directs the Department of General Services to develop and implement policy initiatives to increase opportunities for small businesses to compete for award of Commonwealth contracts as prime contractors. DGS has reserved the following categories of the Information Technology Services ITQ Contract to support this initiative:

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- a. Cabling Services;
- b. Commercial Off-The-Shelf (COTS) Software Services;
- c. Consulting Services - IT Project Management;
- d. Consulting Services - Network Services & Telecom Services; and
- e. IT Training - Classroom/Non-Classroom.

Please refer to [Part I, Chapter 21](#) of the Procurement Handbook for policy and procedures regarding the SBPI.

5. **Training Services (Municipal Training ONLY):** Agencies who want to utilize the Municipal Training category must complete the [Training Services ITQ Review Form](#) and send it to Department of Community and Economic Development for approval. This approval form must be attached to purchase order.

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SOLICITATION

A. PROJECTS ESTIMATED TO COST LESS THAN \$50,000:

1. Agencies are to follow the guidelines set forth in this instruction, unless otherwise stated on the ITQ Contract.
2. Agencies should select a qualified small business in the commodity code(s) applicable to the project and request a quote via email. If small businesses do not exist in the applicable commodity code(s), then the agency may select any qualified Contractor in the commodity code(s) applicable to the project and request a quote via an email.

An agency may select any qualified Contractor who is qualified in the commodity code(s) applicable to the project and request a quote (via email).

Note:

- No renewals, extensions, or change orders which result in the PO exceeding \$50,000 are allowed without prior DGS approval; and
- Agencies may not issue more than two (2) POs and/or Commonwealth Purchasing Card purchases to the same Contractor, for the same Commodity Code, in the same fiscal year without DGS approval.

Exception:

Conference and Event Planning. If the estimated cost of the project (a single event) falls within the Small, No Bid Threshold agencies are permitted to procure these services outside of this ITQ. Agencies must include all components of the event, such as meeting space, AV equipment, food, etc., when estimating the cost. If the actual project cost exceeds the Small, No Bid Threshold the agency must request a waiver from DGS. Please note, the agency may be required to rebid using the ITQ.

IT Services. Agencies must solicit quotes from a minimum of five (5) DGS certified small businesses that are qualified Contractors in the applicable category(ies) of the IT Services ITQ Contract. Agencies may request quotes, and contractors may respond via email. A Statement of Work (SOW) must accompany the agencies' request. The SOW must be attached to the associated PO. All other standard IT Services ITQ Contract procedures for projects of this estimated value apply. Agencies must keep a record of the DGS certified small businesses solicited and ensure that the same five (5) DGS certified small businesses are not solicited repeatedly. See Section I. C. 2. of this document for related information.

B. PROJECTS ESTIMATED TO COST \$50,000 - \$249,999.99:

Agency must solicit all qualified Contractors in the applicable commodity code(s) and applicable counties for the project and may award based on low cost. Agencies have the option of issuing these solicitations as Best Value and to use the Best Value determination with technical, cost and SDB scoring.

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1. **JAGGAER:** Agencies must create a *“Request for Quote”* event utilizing the [JAGGAER](#) software tool. Agencies must choose the template *“ITQ Request for Quote”*.

Agencies should only remove the questions marked “optional” from their event.

All Approved contractors in the applicable service commodity code(s) must be solicited for the project.

Suppliers **NOT** approved in the applicable service commodity code(s) for the project(s) **at the solicitation posting date** will **NOT** be eligible to participate in the Project/Solicitation.

2. **Non-JAGGAER:** Agencies must create a *“Request for Quote”* event utilizing the *“paper”* template *“Request for Quote Template 50,000 and above PAPER”* located under the ITQ documents on the DGS website.

Agencies must solicit **all** qualified contractors in the applicable service commodity code(s) and applicable counties for the project.

3. **LOW COST:** Agencies procuring from one (1) of the listed contracts stated below will create a *“Request for Quote”* event using the *“Low Cost – ITQ Request for Quote”* template located in JAGGAER. Agencies, not utilizing JAGGAER, will have to create their own template.

- a. Aggregate and Anti-Skid Material;
- b. Facility Maintenance Materials;
- c. Facilities Maintenance Services;
- d. Fuels, Tank Wagon Delivery;
- e. Tree Trimming and Stump Removal: and
- f. Snow Mobile Trail Grooming Equipment.

Agencies must solicit **all** qualified contractors in the applicable service commodity code(s) and applicable counties for the project.

Exception:

IT Services: Agencies must solicit **all** DGS certified SDB/SB which are qualified for applicable categories of the IT Services ITQ Contract related to the project. See Section I. C. 4. Of this document for related information.

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C. PROJECTS ESTIMATED TO COST \$250,000.00 to \$1,000,000.00

Agency must solicit all qualified Contractors in the applicable commodity code(s) and applicable counties for the project. The quotes must be rated by applying a Best Value determination with technical, cost and SDB scoring.

D. PROJECTS ESTIMATED TO COST GREATER THAN \$1,000,000.00

Agency must follow the Competitive Sealed Proposal (Request for Proposal (RFP) Process) and the project must be issued as an RFP.

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EVALUATION

A. PROJECTS ESTIMATED TO COST LESS THAN \$50,000:

No evaluation process is required.

B. PROJECTS ESTIMATED TO COST \$50,000 - \$249,999.99:

1. LOW COST:

No evaluation process is required.

2. BEST VALUE (AGENCY DISCRETION):

- a. Evaluation Committee (1-5 members) must be established to evaluate the responses;
- b. The technical responses must be evaluated. The Issuing Officer is responsible for recording the scores and comments on the [Master Scoring](#) spreadsheet. Once the technical response is scored, the Issuing Officer must notify Bureau of Diversity Inclusion and Small Business Opportunities (BDISBO) of all Contractor(s) who met or exceeded the 75% threshold. BDISBO will score the Small Diverse and Small Business (SDB/SB) Participation responses. BDISBO will provide the scores electronically to the Issuing Officer;
- c. The Agency, in its discretion, may conduct a Best and Final Offer (BAFO); and
- d. Agency must complete and retain the [“Recommendation for Best Value Selection Memorandum”](#) upon completion of the evaluation process.

C. PROJECTS ESTIMATED TO COST \$250,000.00 to \$1,000,000.00:

1. BEST VALUE:

- a. Evaluation Committee (1-5 members) must be established to evaluate the responses;
- b. The technical responses must be evaluated. The Issuing Officer is responsible for recording the scores and comments on the [Master Scoring](#) spreadsheet. Once the technical response is scored, the Issuing Officer must notify Bureau of Diversity Inclusion and Small Business Opportunities (BDISBO) of all Contractor(s) who met or exceeded the 75% threshold. BDISBO will score the Small Diverse and Small Business (SDB/SB) Participation responses. BDISBO will provide the scores electronically to the Issuing Officer;
- c. The Agency, in its discretion, may conduct a Best and Final Offer (BAFO); and

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- d. Agency must complete and retain the [“Recommendation for Best Value Selection Memorandum”](#) upon completion of the evaluation process.

2. LOW COST (Applicable to only those ITQ Contracts identified as Low Cost Contracts):

No evaluation process is required.

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AWARD

A. PROJECTS ESTIMATED TO COST LESS THAN \$50,000:

Agency must retain all documentation.

B. PROJECTS ESTIMATED TO COST \$50,000 - \$249,999.99:

Agency must retain all documentation.

C. PROJECTS ESTIMATED TO COST \$250,000.00 to \$1,000,000.00

All documentation should be reviewed and redacted before posting. Agencies must post the following documents onto the Awards section on the [eMarketplace](#) website, upon final approval of the PO:

1. Final Technical Submittal that incorporates all revisions made through BAFO;
2. Final Cost Submittal;
3. Final SDB/SB Submittals; and
4. Request for Quote documentation, including all appendices.

The Issuing Officer will notify the successful and unsuccessful contractors via e-mail. Template letters can be found on the [DGS Collaboration Site](#).

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PURCHASE ORDER

After selecting the qualified Contractor, a PO must be created against the Contractor’s ITQ contract in SRM. There should be no renewals of original PO’s. Agencies must attach the following documents to the PO:

A. PROJECTS UNDER \$50,000 (JAGGAER AND Non-JAGGAER):

Document	<u>Required by DGS</u>	<u>Required by Comptroller’s</u>
Statement of Work	X	X
Suppliers Quote	X	X
Reciprocal Limitations (Materials Only)	X	X
Contractor Responsibility Program (CRP) – mark as “Internal”	X	X
Training Services ITQ Review Approval Form – if utilizing the Municipal Training category off the Training Services ITQ – mark as “Internal”	X	

B. PROJECTS ESTIMATED TO COST \$50,000 - \$249,999.99:

NOTE: If Best Value scoring methodology is utilized, refer to Purchase Order detail TABLE C for required documentation uploads

Document	<u>Required by DGS</u>	<u>Required by Comptroller’s</u>
Statement of Work	X	X
Suppliers Quote	X	X
Reciprocal Limitations (Materials Only)	X	X
Contractor Responsibility Program (CRP) – mark as “Internal”	X	X
Training Services ITQ Review Approval Form – if utilizing the Municipal Training category off the Training Services ITQ – mark as “Internal”	X	

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C. PROJECTS ESTIMATED TO COST \$250,000.00 - \$1,000,000.00

DOCUMENT	<u>Required by DGS</u>	<u>Required by Comptroller's</u>
Contracted Documents – All Documents Submitted by the Awarded Supplier		
<p>JAGGAER: Agencies must attach the Event Summary, depicting the following:</p> <ol style="list-style-type: none"> 1. Description; 2. Prerequisites; 3. Prerequisites attachments (if applicable); 4. Buyer Attachments; 5. Question Attachments; 6. Supplier Responses; 7. Q & A Board; and 8. Q & A Board Attachments (if applicable). <p>The Event Summary can be exported out of JAGGAER. Click here for instructions on how to export.</p> <p>Non-JAGGAER: Agencies not participating in JAGGAER, will need to attach the following:</p> <ol style="list-style-type: none"> 1. Request for Quote Template 50,000 and above PAPER; 2. Appendices; 3. Statement of Work; 	X	X
<ol style="list-style-type: none"> 4. Q & A spreadsheet; 5. Quote Cover Sheet; and 6. Copy of generated email notification to all Qualified Suppliers. 		
Final Technical Submittal	X	X
Final Cost Submittal	X	X
Final SD/SB Submittal	X	X
Domestic Workforce Utilization Form (Service only)	X	X
Iran Free Procurement Form	X	X
Reciprocal Limitations Form (Material only)	X	X
Trade Secret/Confidential Proprietary Information Notice	X	X
Lobbying Certification and Disclosure Form	X	X
Compliance/Internal Approval Documents – all marked “Internal” on PO		
Recommendation for Best Value Selection Memorandum	X	X
COPPAR Cover Letter (if applicable – more information refers to ITP PRO001)	X	X

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Office of Administration (OA) Labor Relations Approval on Employee/Employer related work (if applicable)	X	X
CRP Check Certification Form	X	X
Request for Contractor Term Greater than Five Years Waiver Review Form (BOP-012)	X	X
Comptroller Compliance Documents		
Request to Not Identify Rates on a PO (if applicable)		X
Advance Payment Request Form (Procurement Handbook, Part 1, Chapter 18) (if applicable)		X
Consulting Services ITQ Review Form		X
Ledger 4/6 Forecast & Attestation Form (if applicable)		X
Request for IT Purchase Order Clarification (if applicable)		X

JAGGAER: The Issuing Officer is responsible for uploading a copy of the fully executed PO and all documents to the internal notes section of the event found in JAGGAER.

Non-JAGGAER: Agency must retain all documentation.