



# IT Resource Provider (ITRP) Multi-Step Contracting

MARCH 2016

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## Overview

- This presentation provides an overview on how to bid, and subsequently contract with the State to provide IT Resources using the new Information Technology Resource Program (“ITRP”) multi-step procurement tool. This is an important tool for agencies to meet their IT resource needs.
- Through a competitive solicitation process, seventy-seven (77) vendors have been pre-qualified to provide ITRP resources in one or more of six IT skill categories. Pre-qualification denotes that these vendors (“Members”) meet minimum capability requirements to provide resources in one or more of these categories.
- Pre-qualification only indicates the number of Members currently pre-qualified to perform work in each skill category. However, **ONLY those vendors who have successfully entered into terms and condition (“T&C”) contracts with the state will be permitted to bid on ITRP IFBs.**
- A basic “terms and conditions” contract has been established between the State and each Member for an approximately five (5) year period, beginning in Fall 2016 and ending June 30, 2021, renewable for an additional sixty months.
- Members in each category are eligible to bid on subsequent, agency-developed ITRP Invitation for Bids (“IFB”) containing project-based Statements of Work (“SOW”).
- Establishing these vendor pools and reaching agreement on these basic T&C contracts will reduce the time for issuing IFBs/SOWs, reviewing bids, and processing contracts resulting from future ITRP IFBs.

# IT Skill Categories

Available ITRP contract resources are grouped into six IT skill categories.

A - Application Development

B - Database Administration

C - Solutions Architecture

D - Program Management

E - Technical Support

F - Security Management

## •A **Application Development**

Members have experience providing resources for application development in areas including such positions as Website Designer, Web Developer, Mobile Developer, SharePoint Developer, MS Access Developer, Adobe Developer, Software Developer, Senior Software Developer, Fleet System Developer, Application Deployment: Microsoft Dynamics CRM, Remedy System Developer, Remedy Force Developer, Mainframe Software Developer, Mobile Application Developers.

## •B **Database Administration**

Members have experience providing resources for database administration areas including such positions as: Database Designer; Enterprise Data Administrator; Enterprise Data Architect; and, Information Exchange Package Document (IEPD) Developer.

- **C Solutions Architecture**

Members have experience providing resources for solutions architecture areas including such positions as: Microsoft Solution Architect; IBM Solution Architect; Adobe Solution Architect; Enterprise Content; Management Architect; Business Intelligence/Data Architect, SAP Enterprise Resource Planning Architect; Enterprise Resource Planning (ERP) System Integration Architect; Governance, Risk and Compliance Architect; and, Enterprise Change Management Solution Architect.

- **D Program Management**

Members have experience providing resources for program management areas including such positions as: Project Manager; Program Manager, Jr.; Business Analyst, Sr.; Business Analyst; Computer Engineer / Systems Analyst; and, Enterprise Architect.

- **E Technical Support**

Members have experience providing resources for technical support areas including such positions as: Technical Writers; Technology Trainers; Software Quality Assurance Specialists; Production Control Specialist; Data Analytics, IT Research, Management Consulting and other related IT consulting support roles.

- **F Security Management**

Members have experience providing resources for security management areas including such positions as: Information Security Compliance Analyst; Security Vulnerability Analyst; Security Assessor; Application/Data Security Assessor; Disaster Recovery Services Specialist; Information Security Implementation Specialist; PKI Administrative Specialist; PKI Code Implementation Specialist; and, PKI Systems Analyst.

# Agency Determines IT Resource Need

## Permitted Uses of ITRP Contracting Resources

- ITRP contracting may be used to acquire IT resources to meet agency needs for **specific, well-defined projects**.
  - ITRP resources are **not to be used for staff augmentation**.
  - ITRP projects should be of fixed duration, and/or **requiring skills not possessed by existing state personnel**.
- Bargaining Unit Work:
    - If work can be performed by bargaining unit employees, the proposed project could possibly be approved for ITRP contracting if it fits into one of the following categories:
      1. Time Limited Work – Work based on one of the following exceptions:
        - Emergency Work
        - Temporary or Seasonal Work
        - No Appropriate (state employee) Eligible List
      2. Time Limited Projects – The work to be performed is for time limited projects required to meet certain agency mandates for which specific funds have been dedicated.
      3. Specialized Professional – The work to be performed requires specialized, professional or technical services which cannot reasonably be provided by employees.

## Scope of Work/IFB Development

As with any solicitation, agencies will prepare a scope of work that identifies the expected purpose/goals, deliverables, milestones, and related expectations.

- The IFB/SOW will identify the specific agency need and include detailed information that will describe the type of services necessary to complete the proposed project;
- In order to ensure Members are aware of what services are being requested, agencies must identify those skill categories they will need to perform the project work detailed in each specific IFB/SOW, as well as a list of the Position Names requested under each Skill Category, and the number of resources requested for each Position;
- Finally, in order to help successfully evaluate Members' bids, we encourage agencies to include estimates of hours needed for each specific IFB/SOW.

**STATE OF ILLINOIS  
INVITATION FOR BID**

Department of Innovation and Technology  
Implementation of Automated Sowing Application

#17-IFB-TR01

## IFB Issuance/Bidding Process

- Agencies will issue ITRP IFBs containing their project-specific SOWs by posting the solicitation to the Illinois Procurement Bulletin (“IPB”) or BidBuy.
- Bids are only allowed from pre-qualified Members in the IT skill categories called for in particular project that have executed a T&C contract with the State. If a project calls for more than one skill category, only those Members who are pre-qualified for each skill category called for by that project will be permitted to bid on the IFB/SOW.
- Agencies must attach a list of all Members eligible to participate when publishing the ITRP IFB.
- If a bidder is not a pre-qualified Member, or not pre-qualified in all the IT skill categories requested, their bid will be rejected.

## Small Business Set-Aside (SBSA)

- On projects with an estimated value of \$500,000 or less, preference will be given to pre-qualified Members who are registered Illinois Small Business vendors pursuant to 30 ILCS 500/45-45.
- These projects will be solicited to SBSA ITRP pre-qualified Members first. If the State is unable to make an award to one of the SBSA ITRP pre-qualified Members within a skill category, the project will be re-solicited so that all pre-qualified Members (SBSA and non-SBSA) may bid on the IFB.

# IFB Issuance/Bidding Process con.

## Multi-Tiered Award

- Agencies may award a single or a multi-tiered award. A multi-tiered award may be made to a maximum of 3 Members; a primary, secondary and tertiary Member.
- These Members may work concurrently as secondary and tertiary Members may be tasked to perform work if the primary Member cannot provide the necessary IT resources to perform the work in the SOW. If the State intends to make a multi-tiered award, then the IFB must state so at the time of solicitation or only a single award will be allowed.

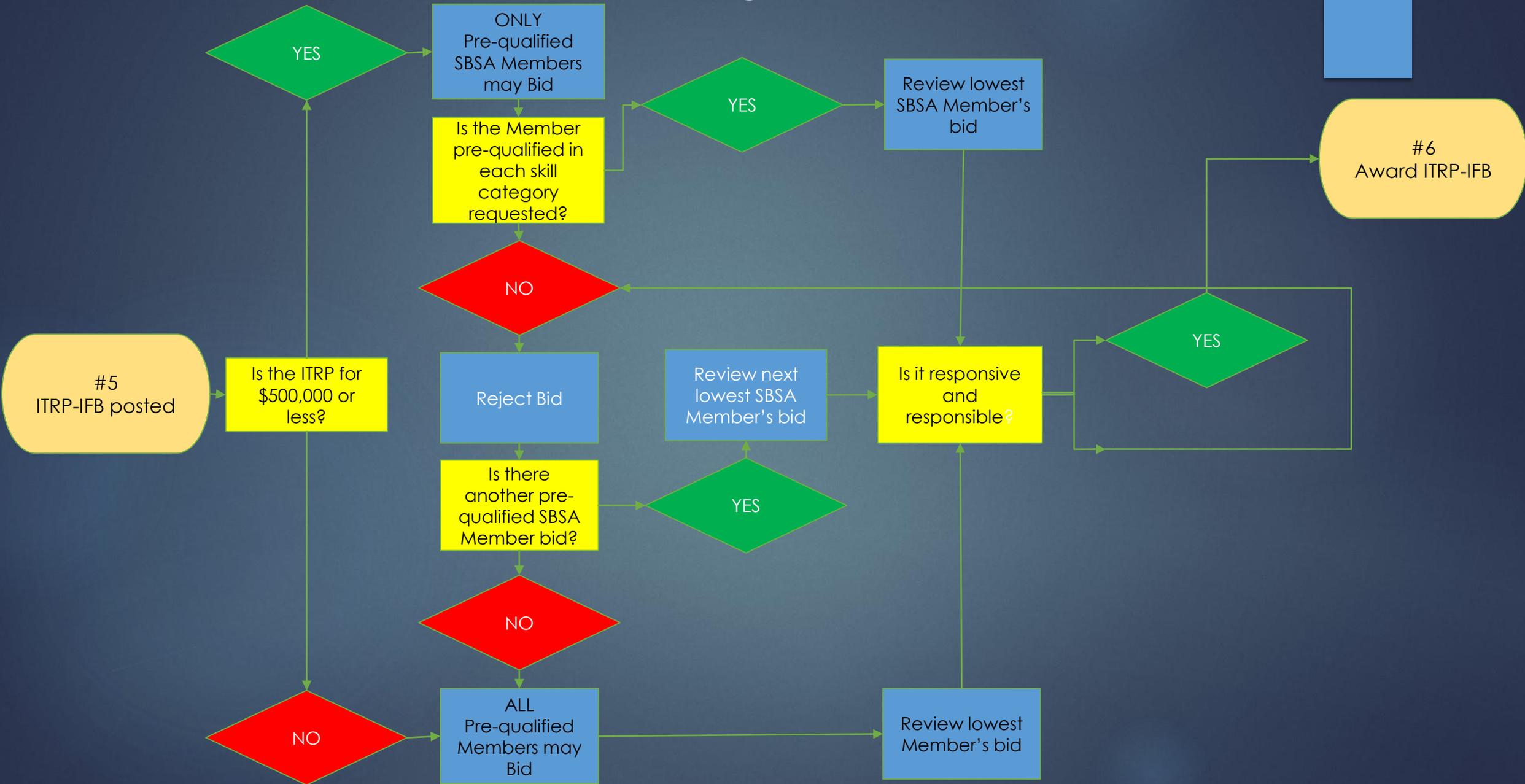
## Annual Pre-qualification

- The current pre-qualified vendor pool participation term will be for an approximately five (5) year period, beginning in Fall 2016 and ending June 30, 2021, renewable for an additional sixty months.
- On an annual basis, vendors will have the opportunity to apply to join the pre-qualified vendor pool. It is the State's goal to maintain a diverse and robust vendor pool for Agencies to work with.
- An up-to-date list of pre-qualified vendors and the skill categories for which they are pre-qualified will be made available to both internal and external stakeholders on the DoIT website.

## Bid Review/Member Selection Process

- Agencies may award a contract to the Member who submits the lowest cost, responsive and responsible bid to provide the resources specified within the ITRP IFB/SOW. The State will consider the information provided and the quality of that information when evaluating the Bid.
  1. A responsive bidder is one who submits a bid that conforms in all material respects to the Invitation for Bid, and includes all required forms.
  2. A responsible Bidder is one who has the capability in all respects to perform fully the contract requirements and who has the integrity and reliability that will assure good faith performance. Factors that the State may evaluate to determine responsibility include, but are not limited to: financial disclosures, past performance in business or industry, references (including those found outside the Offer,) financial responsibility, capacity to produce or other matters relating to the Bidder's ability to deliver in the quality and quantity within the time and price as specified in the IFB.
- If an agency does not consider the lowest cost bid to be responsive or responsible, the agency may choose not to issue an award, or choose to select the Member which submitted the next lowest priced bid.
- However, agencies must demonstrate to the SPO that a pre-qualified bidder with the lowest bid is non-responsive or does not demonstrate the responsibility necessary to deliver in the quality and quantity within the time and price as specified in the IFB. Upon review of this information, the SPO may disqualify a bidder and allow the Agency to move to the next lowest bidder.

# Bidding Process



## Contracting with Members

DoIT has established basis T&C contracts with pre-qualified Members. In addition, the following will apply to these contracts:

- All services performed by Members shall be subject to inspection and acceptance by the agency;
  - If requested, the Member fulfilling a SOW shall participate in a written assessment process, conducted by the State or agency, following the completion of each SOW to determine the performance and efficiency of the resources provided by the Member.
- Members shall abide by applicable State and agency security regulations, policies and standards regarding security of information systems resources. This may include background checks and compliance with other security requirements as a condition of the contract.

## Billing

- Invoicing shall be at the completion of the contract unless invoicing is tied in the contract to milestones and deliverables set in the SOW;
- A record of all authorized hours billed by each Member and its resources shall be maintained by the agency and the Member pursuant to the applicable SOW, and shall not exceed the number of hours authorized in that SOW;
- The vendor *shall not* receive payment for any hours that exceed the maximum number of hours in an approved SOW without a written change order;

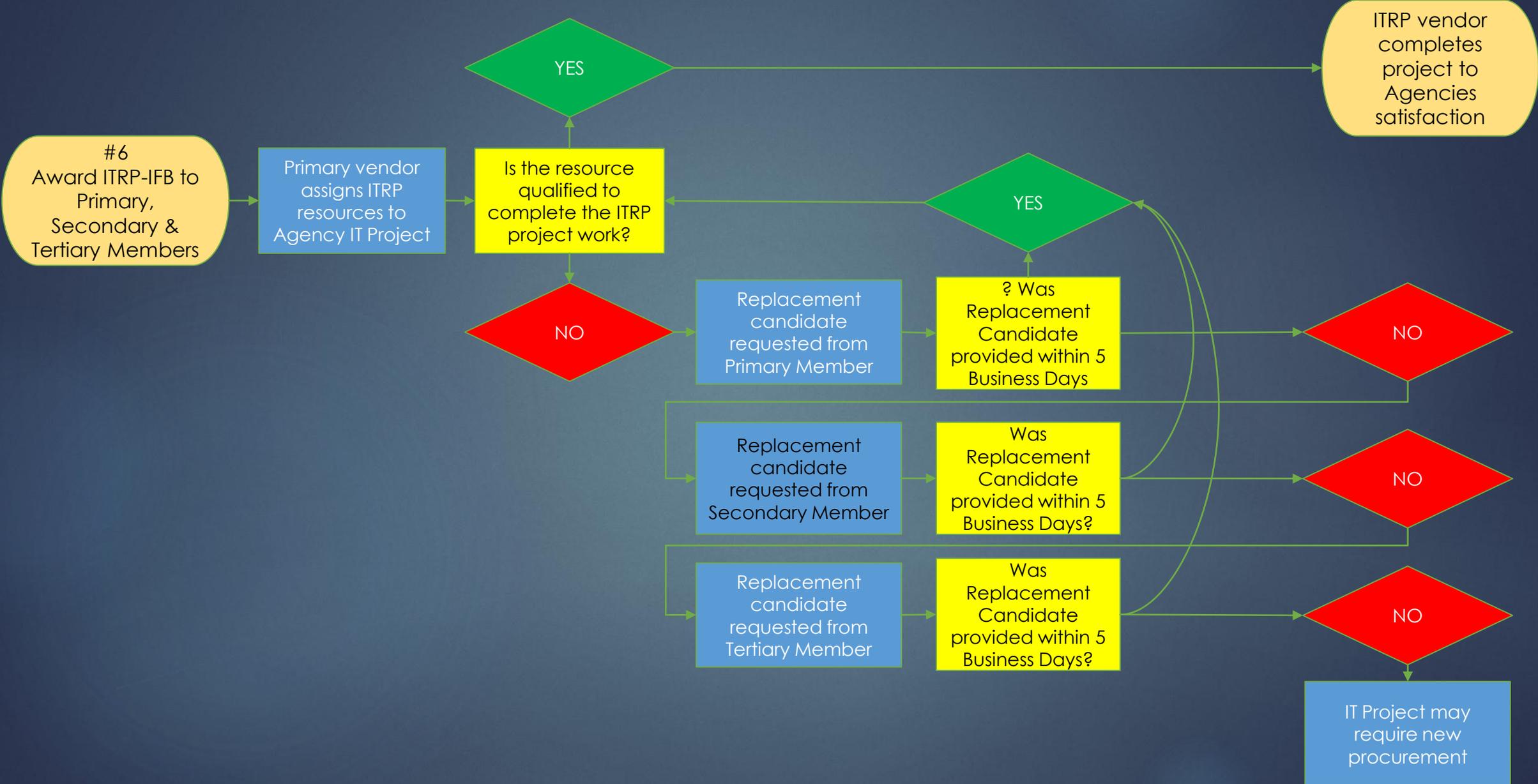
## Unacceptable Member Performance

- If the lowest cost, most responsive and responsible bidding Member provides a resource(s) that is unable to complete the tasks required by the IFB SOW, the agency may, at no cost, request the replacement of the resource upon discovery of the unacceptable performance.
- The agency must make this determination within 14 calendar days of the resource beginning work or a mutually agreed upon timeframe that shall be memorialized in the SOW.
- The Member must identify a replacement resource within five (5) business days, exclusive of any required background checks.
- The winning Member will have one opportunity to replace the resource with an acceptable resource that meets the agency's needs. Subject to the oversight of the State Purchasing Officer, if the Member's second attempt is unsuccessful the agency is allowed to move to the Secondary Member for a multi-step contract or the Member who submitted the second lowest bid for that IFB.
- The agency must provide documentation of why the resource, service, or product was found unacceptable and shall submit this documentation for approval to the designated Agency Purchasing Officer and State Purchasing Officer for that agency before being allowed to move to the second lowest bidding Member.

## Possible Removal from Member Pool

- Three (3) instances of poor vendor performance could ultimately lead to a Member being disqualified from bidding on IFBs until and unless it successfully applies for re-qualification.

# Multi-Tiered Award Process & Unacceptable Member Performance



## To Sum Up

1. Agency Determines IT Resource Need
2. Scope of Work/IFB Development
3. IFB Issuance/Bidding Process
4. Bid Review/Member Selection Process
5. Contracting with Members

## Next Steps

- A set of ITRP Procedures for using the ITRP is available online at [www.Illinois.gov/ITRP](http://www.Illinois.gov/ITRP).
- A list of pre-qualified ITRP vendors, including those registered as Small Businesses, is available online at [www.Illinois.gov/ITRP](http://www.Illinois.gov/ITRP).
- Once approved by the State, ITRP IFB's will be posted to the Illinois Procurement Bulletin ("IPB") or BidBuy.

THANK YOU

Any  
questions?