

How to Use This Contract

This document provides the Authorized User general instructions on how to use the Business Consulting Services (BCS) Contract (“Contract”). An Authorized User must familiarize itself with the Contract Terms and Conditions. Additional general procurement information is available on the OGS website.

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Section 1: General Questions

1.1 OGS Centralized Contract Scope

This Award streamlines the procurement of Business Consulting Services for Authorized Users. To obtain hourly-based business consulting services, an Authorized User must use the process outlined below.

1.2 Who Can Use This Award?

This award is for use by Authorized Users of OGS centralized contracts which includes, but is not limited to, New York State agencies and Non-State organizations (political subdivisions, local governments, public authorities, public schools, fire districts, public and nonprofit libraries, community colleges, and certain other nonpublic/nonprofit organizations).

1.3 How many contractors are on this Award?

There are 10 Contractors on this Award.

1.4 What is the contract term of this Award?

The contract term for this contract runs from January 24th, 2025, until February 29th, 2028.

1.5 What regions are covered by the Award?

The Contract Award includes the entire State of New York.

Section 2: Contract Categories / Requirements for Categories

2.1 Categories - What Types of Products Are Available on This Award?

The Contract has been grouped into three (3) categories (see table below):

Categories	
Category 1: Organizational Development	A category devoted to improving the functioning of an organization's employees, work units, culture, management and business systems, processes, and structure. Bidder agrees to offer all of the disciplines below for this category and as further defined in Purchaser's scope of work.
Category 2: Change Management	A systematic approach to dealing with the transition or transformation of an organization's goals, processes or technologies. The purpose of change management is to implement strategies for affecting change, controlling change, and helping people to adapt to change.
Category 3: Management & Business Analysis	A disciplined approach to identify and define solutions that will maximize the value delivered by an organization to its stakeholders, with an emphasis on financial analysis. The Business Analyst is an agent of change.

2.2 Types of Consulting Services Available in Each Category

2.2.1 CATEGORY - ORGANIZATIONAL DEVELOPMENT

1. ORGANIZATIONAL DEVELOPMENT is a category devoted to improving the functioning of an organization's employees, work units, culture, management and business systems, processes, and structure. Contractor agrees to offer all of the disciplines below for this category and as further defined in Purchaser's scope of work:
 - a. EXECUTIVE COACHING is a professional relationship between a trained coach and a client (who may be an individual or a group) with the goal of enhancing the client's leadership or management performance and development. Executive coaches assist top executives, managers, and other identified leaders to perform, learn, stay healthy and balanced, and effectively guide their teams to

successfully reach desired goals and exceed individual and corporate expectations. Such coaching enables leaders to unlock and unleash their full potential, so they bring greater value and abundance to the people and entities they serve. Executive coaches facilitate solutions through interactive dialog with the client, and use discoveries to compile data, provide feedback to management, identify development opportunities, build awareness, set goals, and create strategy plans, facilitate learning, support, and encourage leaders over the long term, and monitor and assess progress.

- b. Concerning Diversity, Equity, and Inclusion, shall assist agencies and institutions in the following:
 - i. Assisting in developing priorities, goals, and strategies for creating a diverse, inclusive, and culturally competent workforce.
 - ii. Establishing both internal and external committees to advise state government on workforce diversity policy and strategy, including convening cross agency/institution work groups to develop and coordinate enterprise-wide diversity and inclusion initiatives.
 - iii. Establishing streamlined agency, institution, and statewide workforce diversity reporting requirements.
 - iv. Reviewing, evaluating, and implementing agency and institution workforce diversity plans, policies, and strategies.
 - v. Developing and delivering annual reports to the Governor on the state's progress towards creating a diverse, inclusive, and culturally competent workforce.
- c. TEAM DEVELOPMENT COACHING is a process of developing teams to be effective change agents for their organization. The purpose of team building is to increase trust, improve communication, increase collaboration, and increase or maintain motivation. Effective team development motivates people to work together, develop their strengths, and address any weaknesses. Team building exercises and encourage collaboration rather than competition. Team Development Coaches create a safe environment to learn by encouraging cooperation, teamwork, interdependence, and by building trust among team members. Team Development Coaches lead teams through accepted team development techniques, to include five stages of Team Development: Forming, Storming, Norming, Performing, and Adjourning.
- d. COACHING WORKSHOPS ensure sustained learning and application of skills over a wide variety of situations. These workshops support learners, clients and teams in achieving a specific goal by providing training and guidance. Coaching workshops focus on specific tasks or objectives as required by the client, as opposed to more general goals or overall development. Workshops increase the level of knowledge regarding a specific subject while also increasing effectiveness in the team or organization and provide interactive training that transforms learners through the experience, equipping them to continue making progress when they return to work.

2.2.2 CATEGORY - CHANGE MANAGEMENT

1. CHANGE MANAGEMENT is a systematic approach to dealing with the transition or transformation of an organization's goals, processes, or technologies. The purpose of change management is to implement strategies for affecting change, controlling change, and helping people to adapt to change. Contractor agrees to offer all of the disciplines below for this category and as further defined in Purchaser's scope of work:
 - a. All approaches to prepare, support, and help individuals, teams, and organizations make organizational change. The most common change drivers include: technological and cultural evolution, process reviews, crisis management, consumer habit changes, pressure from new business entrants, acquisitions, mergers, and organizational restructuring.
 - b. Preparing, supporting, and helping individuals, teams, and organizations in accomplishing organizational change.
 - c. Includes methods that redirect or redefine the use of resources, business process, budget allocations, or other modes of operation that significantly change a company or organization. It deals with many different disciplines, from behavioral and social sciences to information technology and business solutions.
 - d. Considering the full organization and what needs to change, while change management solely refers to how people and teams are affected by organizational transitions.
 - e. Coaches to lead organizations through change and utilize accepted change management practices to include at a minimum the 16 principles of change management that may include:
 - i. Diagnosing the problem

- ii. Lead with culture
 - iii. Start at the top
 - iv. Involve every layer
 - v. Coalition building
 - vi. Provide clear instructions
 - vii. Transparent communication
 - viii. Training
 - ix. Questions and concerns
 - x. Formal and informal solutions
 - xi. Accountability
 - xii. Appreciation
 - xiii. Ongoing support
 - xiv. Evaluation
 - xv. Assessment, and
 - xvi. Utilizing technology
- f. Practices including knowledge, skills, and awareness for building work environments grounded in diversity, equity, inclusion, and respect where people thrive, missions are accomplished, and the public is served.
2. STRATEGIC PLANNING is a process by which organizations analyze, document, and set realistic goals and objectives. Strategic planning coaches assist entities to define their strategy or direction and make resource allocation decisions that support such strategy. Strategic planning coaches utilize accepted planning strategies, to include the five stages: goal setting, analysis, strategy formation, and strategy monitoring / implementation.
3. PROCESS IMPROVEMENT is identifying, analyzing, and improving upon existing business processes, which enables organizations to continuously improve upon existing business processes to optimize production, quality standards, or any other identified goal, such as cutting cost or lowering length of time to complete a process. Process Improvement is an ongoing practice, to be followed up with the analysis of tangible areas of improvement by employing benchmarking techniques. Process improvement coaches utilize generally accepted process improvement techniques to include, at a minimum: map the process, analyze the process, redesign the process, acquire resources, implement, and communicate change, review the process, and readjust where required. In general, the process improvement process supports needed changes that have been identified through the management and business analysis process.

2.2.3 CATEGORY - MANAGEMENT AND BUSINESS ANALYSIS

1. MANAGEMENT AND BUSINESS ANALYSIS is a disciplined approach to identify and define solutions that will maximize the value delivered by an organization to its stakeholders, with an emphasis on financial analysis. The Business Analyst is an agent of change. Business analysis is used to identify and articulate the need for change in how organizations work, and to facilitate that change. Business analysts work across all levels of an organization and may be involved in defining strategy, creating the enterprise architecture, and taking a leadership role by defining the goals and requirements for programs and projects or supporting continuous improvement in its technology and processes. Business analysis seeks to improve an organization's business and operations at an executive level and maximize revenue and efficiency. Analysts interact with executives, employees, vendors, and clients to determine the strengths and weaknesses of an entity, then provide decision-makers with suggestions to improve their entity. Business Analysts utilize accepted analysis practices, to include the Business Analysis Body of Knowledge (BABOK Guide). Contractor agrees to offer all of the disciplines below for this category and as further defined in Purchaser's scope of work:
- a. SERVICES TO ASSIST MANAGEMENT with operation or management of the agency, unit, or division of the agency (when related primarily to the business processes of the agency, not to human resource issues).
 - b. SERVICES THAT IMPACT AGENCY POLICY, regulatory, and business issues or that have broad agency or statewide policy implications. Services that result in operational or managerial recommendations (related primarily to business and policy issues), management reports and studies, including those requested by the Legislature, and feasibility studies with significant policy impact. Services for needs assessment and business process re-engineering related to the agency's business

and policy responsibilities.

- c. SERVICES FOR PROGRAM DEVELOPMENT, implementation, and coordination; program evaluation and/or external quality review; services for project management and quality assurance services. STAKEHOLDER ANALYSIS to determine who the sponsor and key business stakeholders for a project will be and anyone else who needs to be involved, the multiple perspectives to be included in the requirements, and discover anyone else who needs to be involved. MAINTAIN REQUIREMENTS issues lists, contribute to the project implementation plan, and provide regular status updates. Create meeting agendas, type meeting notes to capture the results of discussions. Manage change requests as required.
- d. CHANGE MANAGEMENT related to this category, to include updating business procedures, checklists, work aids, or new training materials.
- e. ASSIST ENTITIES IN MEETING OBJECTIVES AND GOALS. Understand how work is conducted, through analysis and determine solutions to issues. Solutions could include training, process changes, and modifications to business rules, modifications to or implementation of new technology, or a combination of all four.

Section 3: Contractors / Pricing

3.1 Who are the Contractors?

The participating Contractors are listed on the Contractor Information page.

3.2 Where can I find the Pricing?

A price list with the awarded lots for each vendor can be found on the Pricing Information page. Each contractor's pricing is represented on the Pricing Information page. On this page, you will also be able to see the lots that each vendor is operating within, representing the services that each vendor can provide under this contract.

3.3 What are the terms of Pricing?

The price for Product shall either be at the agreed-upon discounts and service rates listed in Attachment 1 – Pricing, or at a price that is more advantageous to the Authorized User.

3.4 Can an Authorized User negotiate lower pricing on large purchases?

Yes, Authorized Users are encouraged to negotiate lower Pricing at any time.

3.5 How often is Pricing updated?

Price updates vary by contractor. All updates will be posted on the OGS website by Procurement Services. Both current and archived price pages are available on the Contract Landing page.

3.6 How are orders accepted by the Contractors?

Purchase Orders shall be made in accordance with the terms set forth in Appendix B – Purchase Orders. All orders shall reference Contract number, requisition, and/or purchase order number (if applicable). Upon Contractor's receipt of an order, confirmation is to be provided to the Authorized User electronically or via facsimile. Order confirmation shall be itemized, and include purchase price, date of purchase, delivery information (if applicable), Authorized User name, and sales representative (if applicable).

3.7 How do I report any concerns as well as provide positive feedback with this contract?

Authorized Users and/or Contractors should report any problems to the contact person listed on the summary page for this award or post a review on Procurated (<https://go.procurated.com/new-york/>).

Section 4: MWBE / SDVOB Goals

4.1 Does this Award include MWBE goals?

Yes, OGS has established goals. There is a 30% MWBE goal for this award (15% MBE, 15% WBE).

4.2 Does this Award include SDVOB goals?

Yes, OGS has established goals. There is a 3% SDVOB goal for this award.

Section 5: Requesting Quotes

5.1 Are Mini Bids required?

No, mini bids are not required. However, OGS strongly recommends that Authorized Users seek quotes from a minimum of 3 vendors on this award that offer services in the Category being requested.

The Contracts have been issued under a multiple award structure. Authorized Users shall procure services that best meet their form, function, and utility requirements. Pursuant to State Finance Law § 163(10)(c), at the time of purchase, Authorized Users must base their selection among multiple Contracts upon which is the most practical and economical alternative that is in the best interests of the State.

5.2 Prior to Requesting Quotes

The Authorized User should fully identify their business consulting needs, which may include, but are not limited to such factors as:

- Project Plan;
 - Milestones/timeframes
 - Dependencies
 - Roles and responsibilities
 - Other decision points
- Project Timeline;
- Key personnel interviews;
- Location where work will be performed;
- Risk projections and mitigation strategies;
- Any additional requirements imposed by the funding source;
- Implementation end date;
- “To-be” state;
- Available State staffing resources;
- Knowledge Transfer; and
- Training.

Using the above information, the Authorized User should provide enough specificity to allow a Contractor to adequately provide a quote.

5.3 Evaluation of Quotes

- The responses should be evaluated based on the Authorized User’s pre-defined methodology as it relates to project scope described.
- Responses which include pricing in excess of the maximum “Not-To-Exceed” price on the Contractor’s pricelist must be found non-responsive by the Authorized User.
- Responses which include services which do not fall within one of the categories of business consulting services on this contract must be found non-responsive by the Authorized User.

5.4 Negotiation

An Authorized User may enter into negotiations with a tentative awardee. The negotiations should include all aspects of the original scope and ensure that both the Authorized User and Contractor have a full understanding of each other’s roles and responsibilities. The Authorized User should also negotiate to obtain the best price possible for the Project.