

How to Use the Cost Allocation and Rate Setting Statewide Centralized Backdrop Contract Award #23050

The purpose of the Cost Allocation and Rate Setting Backdrop Contract is to provide Authorized Users with a means of acquiring Cost Allocation and Rate Setting Services Statewide.

The Statewide Backdrop Contracts are with firms capable of providing Cost Allocation Services, which include the review of current shared services cost allocation plans, the ability to propose and develop new cost allocation plans as needed, and to assist with negotiation efforts with the Federal Government as necessary to maximize federal reimbursement. All firms are qualified to prepare Cost Allocation plans that are consistent with OMB requirements under 2 CFR Part 225 (formerly Circular A-87 Rev.5/10/04).

Each firm is also able to provide Rate Setting Services, which includes developing, determining and/or modifying rate schedules and fee structures for, but not limited to, billed central services. Billed central services are central services that are billed to benefitted agencies and or programs on an individual fee-for-service or similar basis.

Authorized Users Please Note the Following Requirements:

1. **Authorized Users must use the Request for Quote (RFQ) Process to obtain Cost Allocation and Rate Setting Services, and send the Request to all awarded Contractors.** The Authorized User's request will be competitive based on the development of a specific need in accordance with the contractual terms.
2. The need for Cost Allocation and/or Rate Setting Services will be identified by an Authorized User, and documented in a Request for Quote (RFQ), which may include a Statement of Work (SOW). If using a Statement of Work (SOW) to outline a User's needs, the following, at a minimum, should be considered:
 - Background
 - Objectives
 - Period of Performance
 - Work Requirements
 - Schedule Including Milestones/Deliverables
 - Price
 - Acceptance Criteria
3. Authorized Users are required to send the RFQ to all awarded Contractors for their response. The time frame for Contractors response shall be determined by the Authorized User, and should be clearly noted within the RFQ, including the exact day, date and time responses must be received. **A minimum of five (5) business days should be allowed for each Request to allow the contractor ample time to review the Request, obtain any necessary clarifications, and prepare a Quote response.**
4. **Contractors must provide a response to an Authorized Users RFQ by the due date regardless of whether they intend to provide a Quote.** A Contractor that chooses not to

provide a Quote in response to an Authorized Users Request should detail why they are not able to do so.

5. Contractor selection by the Authorized User will be based on the Contractors response that best meets the Authorized User's needs, and Contractors lowest price.
6. The RFQ process, and Authorized User's selection of Contractor, will result in the issuance of a Purchase Order for Cost Allocation and/or Rate Setting Services. Purchase Orders issued for these services will be governed first by the terms and conditions specified in the OGS Centralized Contract and second by terms and conditions added to the Authorized User's RFQ. (The PCard may not be used.)
7. Contractor questions, clarifications, and/or disputes arising from an Authorized User's RFQ and/or Contractor selection pertaining to such RFQ are to be reviewed and resolved by the Authorized User and not by NYS OGS.
8. Authorized Users may seek quotes for Cost Allocation and Rate Setting Services either together or separately and may choose two different Contractors to satisfy their requirements. For example, one Contractor may be chosen to provide Cost Allocation Services and a different Contractor may be chosen for Rate Setting Services by the same Authorized User.
9. Contractors may provide quotes, which are valid for up to a two-year period, (24) months, but not less than 60 calendar days. If a Purchase Order has not been issued against a quote within the quote validity date, a new quote must be issued. Purchase Orders may not be issued against expired quotes.
10. Purchase Orders may be issued for up to a two-year period, (24 months), so long as the Purchase Order is issued within the term of the Centralized Backdrop Contract. A Purchase Order that goes beyond the end of a fiscal year for a state agency will require a change notice to be implemented in the Statewide Financial System in order to authorize payments after the end of the prior fiscal year. Change notices are also allowed for up to a two-year period, (24 months), upon both parties agreement. Authorized Users are encouraged to consider their fiscal year requirements with regard to quotes and purchase orders and their expiration dates.
11. Authorized Users must maintain a record of the Contractors they send a Request for Quote to along with the Contractors' response. It is highly recommended that the Authorized User save both an electronic copy, and print-out of their email for the RFQ, for inclusion in their procurement record and submission to the OGS Business Services Center (BSC), should a listing be requested. **All NYS Procurement Guidelines must be followed and the Authorized User's procurement record should clearly show why one Contractor was chosen over another.**
12. All Purchase Orders should clearly note the OGS Contract Name and Award Number, and the Contract Number for the selected Contractor (PSxxxxx). A Contractor shall not initiate services until the Purchase Order is issued, and an Authorized User shall not request performance of services until the Purchase Order has been issued.

Frequently Asked Questions (FAQ's)

1. How do I know if I'm an Authorized User of NYS OGS contracts, including the Cost Allocation and Rate Setting Backdrop Contract?

Answer: Please contact NYS OGS Procurement Services Customer Services at: 518-474-6717, or via email at: OGS.sm.customer.services@ogs.ny.gov.

2. If I am a NYS Agency am I required to obtain three (3) quotes from the Contractors listed under the OGS Backdrop Contract?

Answer: See The NYS Procurement Guidelines "Backdrop Contracts" for rules on Agency purchasing:
<https://nyspro.ogs.ny.gov/sites/default/files/uploaded/NYS%20Procurement%20Guidelines.pdf>

3. Are PCard purchases allowed under this Backdrop Contract?

Answer: No. The Contractors listed under this Award do NOT accept the PCard.

4. What if I need Cost Allocation services now, and Rate Setting services at a later date; can I issue a Request for Quote now for both services, and make my selection for one of the services at a later date?

Answer: Yes, however, note that Quotes must remain valid for at least 60 calendar days. After that, if a Purchase Order has not been issued against that quote, a new quote must be obtained. Contractor pricing listed is not-to-exceed, and the Contractor is not required to quote the same pricing after the original 60 days has passed.

5. Are Contractors allowed to increase their not-to-exceed pricing during the term of the backdrop contract?

Answer: No. The posted not-to-exceed hourly pricing will remain in effect for the duration of the contract, including extension(s). In addition, Contractors may not add new titles to their pricelist.

6. Are MWBE goals assigned to this Backdrop Contract?

Answer: No. Please contact Anuola Surgick or Tryphina Ramsey with any questions pertaining to MWBE goals at: MWBE@ogs.ny.gov.

7. How do I know if the Backdrop Contractors are up to date on their required insurances?

Answer: Please contact the OGS Bureau of Risk Insurance Management (BRIM) at: ogs.sm.insrev@ogs.ny.gov.

8. Who do I contact if I have still have questions regarding the Backdrop Contract?

Answer: Please contact the Contract Administrator, Melissa Gretten, at: 518-402-5978, or via email, at: melissa.gretten@ogs.ny.gov.