

## **Subject: Survey of Major Information Technology Contracts**

**DUE DATE: September 8, 2014**

In response to the Governor's Executive Directive Two - Assessing And Evaluating Major Information Technology And Service Contracts ( [ED-2](#) ), the Department of Planning and Budget has posted an IT services contracts survey on the DPB webpage (See <http://dpb.virginia.gov/> or [http://dpb.virginia.gov/forms/forms.cfm?search=Executive%20Directive%20Two%20\(2014\)%20-%20IT%20Contracts%20Survey](http://dpb.virginia.gov/forms/forms.cfm?search=Executive%20Directive%20Two%20(2014)%20-%20IT%20Contracts%20Survey)). This survey has been prepared for completion by Executive Branch agencies with active IT services contracts exceeding \$1 million in activity since July 1, 2012.

Please read the following detailed instructions prior to downloading and completing the survey.

### **Step 1, Downloading the Survey Template and Enabling Macros:**

Navigate to the following link listed above on the DPB website.

#### **If you are using Internet Explorer as your Internet browser:**

1. RIGHT-CLICK on the link for the Excel "IT Services Contract Survey Template".
2. Select "Save Target As" and save the file to your local drive. Please include your three digit agency code in the file when saving.
3. Once the file is saved, close Internet Explorer and open the file using Excel.
4. Please note that in order for the template to operate correctly, you must click on the "ENABLE MACROS" button.
5. If you are prompted with a Microsoft Visual Basic error, please see the instructions below on adjusting macro security levels.

#### **If you are using Mozilla Firefox as your Internet browser:**

1. Click on the link for the Excel "IT Services Contract Survey".
2. After you click on the file name on the website, you will be prompted to open the file or save it to a drive. You should choose to save the file to your computer. Please include your three digit agency code in the file when saving.
3. A box will appear warning you that the file contains macros. The box will prompt you to disable the macros or to enable the macros.
4. Please note that in order for the template to operate correctly, you must click on the "ENABLE MACROS" button.
5. If you are prompted with a Microsoft Visual Basic error, please see the instructions below on adjusting macro security levels.

#### **If you are prompted with a Microsoft Visual Basic error alerting you to disabled macros:**

**For Excel 2007 and later version users, please use the following instructions:**

Before opening the Excel template the following set-up needs to be done.

1. Open Excel 2007 or later version.
2. Select the “Office Button” in the upper left hand corner of the window.
3. At the bottom of the window, select the “Excel Options” button.
4. On the “Excel Options” window, select the “Trust Center” from the selections along the left of the page.
5. Then, select the “Trust Center Settings...” button near the center of the page.
6. On the “Trust Center” window, select “Macro Settings” along the left of the window.
7. Under the “Macro Settings” section select “Enable all macros”.
8. Select “OK” to close the “Trust Center” window, then “OK” again to close the “Excel Options” window.

## **Step 2, Completing the Survey:**

The first step in completing the survey after you have downloaded and opened the template is to select your agency code from the dropdown at the top of the Excel file. If you have contracts with a total activity of \$1 million and over since July 1, 2012, in service related commodity codes in eVA, these contracts will auto-populate in the template after you select your agency code.

After selecting your agency, review the pre-populated list of service contracts (if applicable). The pre-populated items are based on a variety of service related commodity codes so some of these contracts may not involve information technology services. You should not delete these, but indicate that they are not IT contracts in the applicable column (column G).

For pre-populated contracts, the agency code, agency name, contract number, vendor name, number of purchase orders/transactions, and the total dollar costs should be pre-populated.

If no contracts pre-populate after selecting your agency code, but you think you do have one or more applicable contracts (IT services of \$1 million and over), you may enter the details for such contracts manually. Please keep in mind that this template is primarily concerned with major information technology services contracts so please do not add other types of contracts to this survey.

Note: Please see the “Major Service Contracts by Agency” Excel file on the DPB website (<http://dpb.virginia.gov/> or [http://dpb.virginia.gov/forms/forms.cfm?search=Executive%20Directive%20Two%20\(2014\)%20-%20IT%20Contracts%20Survey](http://dpb.virginia.gov/forms/forms.cfm?search=Executive%20Directive%20Two%20(2014)%20-%20IT%20Contracts%20Survey)) to find out if your agency has any contracts that will be pre-populated.

The column by column instructions for completing the template are as follows:

### **Agency Number and Agency Name (Columns A and B)**

If not pre-populated, enter a three digit agency code for each contract.

### **State Contract Number (Column C)**

If not pre-populated, enter the contract number for each contract.

**Vendor Name (Column D)**

If not pre-populated, enter the name of the company awarded the contract.

**Count of Purchase Orders / Transactions (Column E)**

If not pre-populated, enter the number of purchase orders and other transactions in eVA associated with this contract since July 1, 2012.

**Dollar Total of all Purchase Orders / Transactions (Column F)**

If not pre-populated, enter the total dollar amount executed under the contract since July 1, 2012.

**Does the majority of this item represent IT services? (Column K)**

Select "Yes" if the contract is primarily information technology related. Select "No" if it is not. If you select "No" for a contract, you do not need to complete the remaining columns for that individual item.

**Description of Contract (Column L)**

Enter a very brief description of the contract.

**Procurement Method (Column M)**

Select the Procurement Method from the list in the dropdown box (eg. Competitive Sealed Bidding, Sole Source, Competitive Negotiation, etc..)

**Contract Start Date and Contract End Date (Columns N and O)**

Enter the date the contract started and the date the current contract term is scheduled to end.

**Does Contract Allow for Extension? (Column P)**

If the contract contains provisions allowing for extensions, select "Yes", if not, select "No".

**Does the Contract have Performance Standards and Benchmarks? (Column Q)**

If the contract contains provisions requiring performance standards and/or benchmarks select "Yes", if not, select "No".

**Projected FY 2015 Contractor Labor Hours (Column R)**

Enter the total projected hours expected to be worked by all contractor personnel under the contract for FY 2015.

**Projected FY 2015 State Employee Labor Hours (Column S)**

Enter the total projected state employee hours expected in FY 2015 associated with the management of the contract.

**Would it be feasible for portions of these services to be completed with State Employees, if the MEL were available and able to be filled? (Column T)**

Review of the scope of the contracted services. If it is feasible for a portion of these services to be completed with State Employees, please select "Yes". If not, please select "No." Provide an explanation in the Agency Comments field.

**Agency Comments (Column U)**

Enter explanation regarding answers in column T or any other applicable comments or explanation regarding the contract.

**Step 3, Submitting the Survey:**

If you have no contracts to report that meet the requirements of this survey (Information Technology Services contracts \$1 million and over) please send your DPB budget analyst an email message that you do not have any applicable contracts.

If you do have applicable contracts to report on this survey, please send a copy of your survey template file to [budget@dpb.virginia.gov](mailto:budget@dpb.virginia.gov) with a copy to your DPB budget analyst. Please make sure that the filename of your template contains your three digit agency code.

Submissions are due by 5:00 PM on September 8, 2014. This includes reporting to your DPB analyst if you have no applicable contracts.

If you have any questions, please contact your agency's DPB analyst.