

Recommended Considerations When Contracting for GIS Services

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Objective, Intended Audience, and Content

Objectives

- This document is intended as a resource to assist in the process of contracting for competitively priced, high quality, professional GIS services.
- It is meant to offer some insight into the contracting process, from the consultants' perspective .
- It is meant to encourage professional conduct to get professional results.
- It is not meant to be a definitive policy or comprehensive framework.

Intended Audience

- This document can be used by any organization or individual. However, it is likely to have most value to organizations with limited experience contracting for professional GIS services. It is further intended to encourage consistency in the contracting process.

Content

- Logically structured set of recommendations that can be used as a checklist.
- Summary comments

Checklist of Considerations

Identify Objective(s)

- General understanding of what needs to be done and why.
- Detailed specifications are not needed at this point.
- Consider the future and what changes may be required and/or desired.

Determine Required Resources

- What collection of resources are needed to complete this work?
- This may include one or more of the following: hardware; software; data; and technical expertise.
- It may be helpful to distinguish between commercial products and personnel resources. Different approaches may be required for purchasing services versus products.
- Always consider both one-time and ongoing requirements.

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Evaluate Options

Technical Expertise: in-house staff, consultants, other organizations, etc.

Commercial Hardware and Software: State contract, direct from vendor, multiple bids, etc.

Data: Acquire or develop? Is the data already available from another source?

Select Approach

- Determine how the necessary resources will be acquired.

Estimate Budget

- This estimate should be realistic and comprehensive. It should include elements not always considered such as qa/qc, documentation, training, technical support, ongoing maintenance, etc.
- Techniques for estimating costs include:
 - RFI (for larger project)
 - Outreach to others (GIS list serve, other orgs. that may have experience, etc.)
 - Estimate the number of person hours and apply an appropriate hourly rate (OGS consultant list can be used as a reference)

Continued

Estimate In-House Requirements

- Project management
- Time commitment for internal staff
- Other resources (computers, software licenses, Internet connectivity, etc.)
- Support from IT staff

Ensure Adequate Funds and Support

- Confirm that the necessary funds are available
- Confirm that in-house support is committed
- Consider long-term commitment of financial and other resources
- May need to revise scope, if funds are not deemed sufficient

Develop RFP

- Should be developed in accordance with an organizations procurement requirements
- Include a suitable level of detail (e.g., specs., expected results/deliverables, etc.)
- Allow consultant to recommend methodology/strategy to achieve project objectives
- RFP should request project methodology, schedule, qualifications (company and project team), and relevant project experience
- When possible, require staged deliverable tied to payments
- Identify selection criteria and selection process, e.g., committee, etc.
- Should include timeframe for responses as well as award date
- Should include payment schedule

Continued

Identify List of Qualified Consultants

- SARA list
- OGS backdrop contract list
- Consult with other organizations (referrals)
- Need to be aware that some lists may include consultants not targeted to GIS industry
- Need to be aware of limitations of some lists in terms of self-updates, etc.

Issue RFP

- Allow reasonable timeframe for responses (this will vary with scope)
- Submittal requirements e.g., format, # of copies, etc.
- Determine process for handling questions and answers (should go out to all who expressed interested)

Selection Process / Review Responses

- Selection committee
- Independent review of costs v. technical? (depends on scope)
- Interview and/or oral presentations, if needed (more important for larger projects)
- Always check references (otherwise, why ask)

Award Contract

- As a professional courtesy, notify all bidders of the selection outcome, in a timely fashion. For NYS State agencies, this is actually a requirement.

Summary

- ❖ Many government organizations commonly opt to outsource GIS projects.
- ❖ A number of highly capable firms and individuals are available to perform a full range of GIS services.
- ❖ When contracting for these types of services, organizations are encouraged to follow a thorough procurement process, that takes into consideration the material presented in this document.
- ❖ This should result in a bidding process that is fair, well thought out, and conducive to selecting a firm or individual well-suited to meet the project requirements.