



**State of Oklahoma
Office of Management and Enterprise Services
Information Services Division**

Amendment of Solicitation

Date of Issuance: 5/28/2014 Solicitation No. 0900000136
 Requisition No. _____ Amendment No. 2

Hours and date specified for receipt of offers is changed: No Yes, to: _____ CST/CDT

Pursuant to OAC 580:15-4-5©, this document shall serve as official notice of amendment to the Solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent. Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
- (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY AND RETURN TO:

Office of Management and Enterprise Services
 ISD Procurement Attn: Sheri Keller
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Sheri Keller
 Procurement Specialist
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Description of Amendment:

a. This is to incorporate the following:

The questions for this solicitation were due May 16, 2014. Please see below all the questions and answers for solicitation 0900000136.

PLEASE ENSURE THAT BOTH AMENDMENTS FOR THIS SOLICITATION ARE SIGNED AND RETURNED WITH YOUR PROPOSAL

Due date remains. 3 p.m. CDT June 6, 2014

Page comment added by Jill Roberts

What is the cut off date for solicitation questions? We couldn't find a date in the RFP and the date provided on this page states Nov. 15, 2013.

OMES Answer: Section E.7.3 - Questions are due NLT May 16, 2014.

b. All other terms and conditions remain unchanged.

Supplier Company Name (**PRINT**) _____ Date _____

Authorized Representative Name (**PRINT**) _____ Title _____ Authorized Representative Signature _____



Page comment added by Paul Gigliotti

Will OMES release a copy of the RFP in MS Word, so vendors may copy/paste the requirements without having to reformat, particularly sections C.3 - C.11?

OMES Answer: The word document has been uploaded

<http://www.ok.gov/cio/Procurement/Solicitations/0900000136.html>

Page comment added by Starr Goodspeed

1. The Solicitation contains conflicting information as to whether Bidders are bound to the terms of the Solicitation without opportunity to negotiate. Section A.5.1 states, "Submitted Bids are rendered as a legal offer and when accepted by the State, shall constitute a contract." Further, section D.3.3 states, "The requirements of this Solicitation shall not be negotiable and shall remain unchanged..." Both clauses seem to indicate that by submitting a bid, a bidder agrees to be bound by the terms of the Solicitation without opportunity to negotiate. However, this conflicts with several other sections of the document, including section A.52, which states that bidders will comply with all terms and conditions, "unless otherwise provided in Section One of the Bidder's response;" section D.3 which states, "The State shall consider all issues negotiable..." and sections E.3 and E.10.1 which note that Bidders may take exception to the terms and conditions. Please confirm that Bidders may submit Bids subject to any proposed exceptions, as noted throughout the document, and the Solicitation is not binding to the terms and conditions as written.

OMES Answer 1: OMES procurement will review any exceptions to the terms and conditions.

2. Section A.5.2 conflicts as to order of precedence. The first sentence states, "The Contract Documents....shall have the following order of precedence: this Solicitation, other contract award documents,..." However, the second sentence states, "In the event there is a conflict....the other contract documents prevail over this Solicitation..." which directly conflicts with the first sentence. Please clarify the order of precedence.

OMES Answer 2: The order of precedence is as follows: The Contract Documents resulting from this Solicitation shall have the following order of precedence: this Solicitation, other contract award documents, including but not limited to the Purchase Order, Amendments, required certification statements, change orders and license and other similar agreements; and the successful Bid.

Please fully describe what is required of C.3.1, State Monitoring Component

What does OSDE currently do for monitoring?

Is it required that the monitoring component be implemented at the time of award?

OMES Answer: OSDE does a variety of monitoring activities using our current electronic system. We are able to pull some reports, to review forms packets for desk audits, review various data elements, etc.

Yes it is required for the monitoring component to be implemented at the time of award.

Page comment added by Paul Gigliotti

Please describe the full scope is required of C.3.4 System must provide reporting mechanisms for both district and state personnel.

OMES Answer: This is a general requirement that the system must provide various reports at the state and district levels, under section C.9 there are more detailed requested functionality for reporting.



Page comment added by Paul Gigliotti

C.5.4. System may provide a method to display all the sites in each district assigned to the compliance person. – Please clarify if this related to technical (IT) issues or customer service related issues?

OMES Answer: This is related to access. If a compliance monitor is assigned to monitor a district they should be able to see all information for each site within that district.

Page comment added by Paul Gigliotti

C.5.9. System may allow for but not require electronic (wet eSignatures) for all documents. – please define what is required of this item.

OMES Answer: We would like for the system to be able to accept electronic signatures, rather than requiring the districts to print out an IEP to have the team sign, and then upload to the system

Page comment added by Nancy Mensinger

1. On Page 33, Please clarify what is meant by the following: C.16.10.Escalation process for installation service dates and other commitments that are not met for and wireless services

OMES Answer: The verbiage “met for wireless and services” is a typo. This should not be part of the requirement.

2. On page 46, G. PRICE AND COST -Pricing shall be submitted for the Initial Term and each of the potential renewal terms in a separate sealed envelope or binder and on separate CD-ROMs apart from the technical bid, which shall be identified in accordance with Sections A.6, A.8, E.3 and Error! Reference source not found...

OMES Answer 2: The error message is an error. Disregard “Error! Reference source not found...”

3. Do you require 16 separate CD-ROMs -- 8 for the Bid and 8 for the Pricing?

OMES Answer 3: Yes there should be 16 CDs. 8 with the technical proposal and 8 with the pricing.

On page 40 it states they want for both the bid and the price:"one original and 7 copies of the price on a CD-ROM for a total of 8 electronic documents."

Page comment added by Paul Gigliotti

C.11.1.2. System may be able to do group re-assignments of students. When a teacher leaves, the district can reassign each student's previously assigned teacher in Municipal Accounting Systems (MAS).

Is it the intention that the awarded system interface with MAS? Is this to be done via SIF?

OMES Answer: “MAS” is a typo. This should read “System may be able to perform group re-assignments of students. When a teacher leaves, the district can reassign each student's previously assigned teacher in bulk”

Page comment added by Starr Goodspeed

Is the solicitation for the Oklahoma Statewide Special Education System RFP # 0900000136binding with the terms and conditions as written?



OMES Answer: Per section E.13.1 e) any exceptions to solicitation terms and conditions should be included in Section One – Introduction.

Page comment added by Nancy Mensinger

What is the expected start date for the 2014-2015 pilot?

OMES Answer 1: This would depend on the implementation work plan that is submitted and then agreed upon with the vendor and OSDE. We are using the term pilot loosely, we have several school districts that have volunteered to either do duplicate entry for some of this students in the current system and the new system, or they are going to be testing it out.

Is it expected that the data conversion for all existing documents will be done for the pilot school districts?

OMES Answer 2: It is expected that all data conversation will be done for all of the school districts at some point, but for the pilot we would be ok with a subset of the data from the pilot school district being brought over.

Have any of the current vendors submitted transition plans in the event of a turnover to another vendor?

OMES Answer 3: No

How many current systems are in place that we would have to convert data from? Will the state or current vendor be responsible for providing the data to the new vendor? What level of cooperation is anticipated?

OMES Answer 4: There is currently one state system that data will need to be converted from. The current vendor will be providing the data to OSDE and

OSDE will deliver to the awarded vendor. It is not expected that the two vendors will need to interact with each other OSDE will be the intermediary.

Your RFP states that the system must provide use for off-line. Could you provide further details for what you want with an off-line system?

OMES Answer 5: In the event that the school district loses connectivity in the middle of updating a student's records we would like them to be able to save their changes and continue their work. In Oklahoma we have a lot of rural districts that have interment connectivity, this is not a mandatory requirements but we would like to explore the options.

Page comment added by Paul Gigliotti

C.5.1. System may provide a method of escalation using email notification based on an escalation process established in the business rules.

To clarify, is this pertaining to IEP deadlines and due-dates? If not, please elaborate as to what is required of this item.

OMES Answer: The escalation process is not only for IEP's but also for three year reevaluation timelines.

Page comment added by Carmen Cavolo

General Questions

1. A.44. Ownership Rights - If a generally available, meaning already in use outside of OK, IEP software product is offered, is the OSDE claiming ownership rights to any fixes or enhancements made to the generally available product during the contract period?



OMES Answer: If needed, this provision would be further negotiated with the awarded vendor

2. C.1 The RFP states, "This transactional system will be implemented statewide to serve 80,000 students and eventually expanded to serve 130,000 students statewide." These numbers affect pricing and implementation models. There are two questions. First, are these numbers referring to the total number of students with an IEP in Oklahoma or is there some other defining element? Second, what will determine when and if the system expands to 130,000 students?

OMES Answer: This number represents the estimated number of children on IEP's, 504 Plans, and other included plan types. The system is provided for use by all districts but it is up to the individual district if they want to use it.

3. What 4 school districts do not use the current IEP system and do you expect them to use the new system?

OMES Answer: The districts that currently use different systems cannot be identified at this time. They will have the option to use the new system but will only be required to interface to provide data for reporting purposes.

Page comment added by Carmen Cavolo

Data Conversion

1. Which off-the-shelf IEP system is used by the OSDE?

OMES Answer 1: Currently it is SEAS

2. What type of DBMS does the current OSDE IEP system(s) use?

OMES Answer 2: The current system is hosted by the vendor so we do not know the DBMS specifics. The data will be retrieved from them in CSV. format for integration into the new system.

3. Which IEP systems are used by the four districts that use their own systems?

OMES Answer 3: The state does not gather this information as they are required to submit their data into SDE into the same format as everyone else.

4. What type of DBMS's do each of the four districts use for their IEP systems? (SQL Server, Oracle, etc)

OMES Answer 4: SDE does not have this information

5. Can the proposed conversion tool(s) access the current off-the-shelf OSDE IEP system's DBMS from a single central location on the OSDE network to perform the data conversion?

OMES Answer 5: No

6. How many IEP databases would need to be processed by the proposed conversion tool? (we are assuming 5: 1 state, plus 4 district).

OMES Answer 6: Yes that is a correct assumption

7. What type of DBMS does the current IFSP system(s) use?

OMES Answer 7: The current IFSP system is in SQL



8. Can the offered conversion tool(s) access the current IFPS system's DBMS from a single central location on the OSDE network to perform the data conversion?

OMES Answer 8: Yes

9. How many IEP databases would need to be processed by the proposed conversion tool? (we are assuming 1 state).

OMES Answer 9: A possibility of 5 if the 4 districts not currently using the tool want to use it.

10. What type of DBMS does the current ISP system(s) use?

OMES Answer 10: The ISP's are for private school students and are currently being tracked on paper, or possibly some home grown systems.

11. Can the offered conversion tool(s) access the current IFS system's DBMS from a single central location on the OSDE network to perform the data conversion?

OMES Answer 11: See question 5

12. How many IEP databases would need to be processed by the proposed conversion tool? (we are assuming 1 state).

OMES Answer: See question 9

Page comment added by Carmen Cavolo

Plans

1. Please clarify what is meant by this item: "C.7.4.9. System tracks all goals/accommodations for each student independent of the document in which the goal was created."

OMES Answer: A student might have a goal on an IFSP but then be moved to an IEP. The tracking of the student's progress towards the goal should not be affected by the move.

Page comment added by Carmen Cavolo

Security and Data Sharing

1. Please provide use case(s) for when the following functionality would be needed: "C.11.3.5. System provides a method for a student to be associated to more than one district and or site."

OMES Answer 1: Students may receive services at more than one site in a single district or sites within multiple districts depending on where the necessary services can be accessed. We need to be able to associate all sites and districts where services are received to the individual student receiving the services.

Data Schema

1. Is this requirement referring to any particular data standards? Please clarify which standards. "C.3.8. System must follow standard data specifications, or specify the data specification used"

OMES Answer 1: Preferably SIF or CEDS standards would be used but we are open to other possibilities.



2. What is intended by this requirement and how would these standard schema be used by the OSDE in the desired system. "C.11.5.2. Data schemas may be based on the national standards (SIF, CEDS) SIF is the preferred schema. If an element is not included in SIF or CEDS, it must comply with the OSDE Data Dictionary. "

OMES Answer 2: This allows for easy interface with our systems for reporting and data analysis. If elements outside the standard are used it will require mapping before we can interface with existing systems.

3. Please provide the OSDE Data Dictionary and the requirements for complying with it.

OMES Answer 3: The link to the requirements is below and a link to the Special Education Data Manual will be added to the [OMES solicitation page](#).

http://www.ok.gov/sde/sites/ok.gov.sde/files/2.x%20Wave%20Requirements_v1.6.pdf

Page comment added by Carmen Cavolo

PHOCIS

1. What student identifying fields are sent in the file received from PHOCIS?

OMES Answer: There are no files received from PHOCIS. Duplicate data is entered in both systems. The EIS (Early Intervention System) uses the Client_id and the PHOCIS system uses a PHOCIS_id. Both identifying fields are stored in the EIS database.

2. What mechanism(s) exists to exchange the PHOCIS data with the offered solution?

OMES Answer: There is no existing mechanism between the two applications other than Double data entry. EIS is web base and PHOCIS is a Windows Application system

3. Is there a possibility that service logging and Medicaid billing could be performed by the new OSDE Special Education system that is procured through this RFP so that the system could bypass PHOCIS or push service log data to PHOCIS?

OMES Answer: Yes that is a possibility.

Page comment added by Carmen Cavolo

SIS Integration (the Wave)

1. Is the integration with the "Oklahoma Student Testing Number" just an aspect of integration with the Wave system? If not, please explain the expected data exchange mechanisms, data formats, data elements and exchange frequency required for the Student Testing Number system integration.

OMES Answer 1: Yes, the Oklahoma Student Testing Number is the preferred way of tracking and linking a student within the WAVE system. Since all SIS integrate with WAVE using student testing numbers it will also allow for easy matching and integration with the LEA's

2. Is it acceptable to only interface with the Wave and not with the SIS at any districts? If not, please describe use cases when both interfaces would be needed. This is regarding these two items:

OMES Answer 2: Preferably the system would be able to do both. The WAVE does not send information to the SIS so if the system integrates only with the WAVE the LEA's will not be able to feed the IEP information back into their systems. The interface with the WAVE is required for reporting purposes and is not optional.



C.11.7.4. System provides a method to interface with the existing Student Information Systems (SIS) in all districts.

C.11.7.5. System provides a method to interface with the Wave, which is the State's SIS and operations on a SIF standard.

2. What is the direction(s) of the data flow between the Wave and the offered system for each of the elements and is it bi-directional?

OMES Answer 2: No. It is uni-directional with information flowing from the LEA SIS to WAVE only.

3. Assuming an OSDE-hosted system, is it acceptable for the offered system to query the Wave database directly to accomplish the integration, or must SIF be used for the integration?

OMES Answer 3: The WAVE database uses SIF standards. The direct query system would need to be evaluated for acceptability.

4. And, if a direct database connection approach is used, is there data in the Wave database to determine which records were added, modified, or deleted since the last import?

OMES Answer 4: There should be a date time stamps for all updates

5. If SIF integration is used for SIS integration, can the offered solution integrate with the OSDE ZIS and receive SIF_Event messages from the districts, or must the data pass through the Wave first?

OMES Answer 5: No. It doesn't need to pass through Wave first.

6. For which objects are SIF_Events sent from the districts to the OSDE?

OMES Answer 6: StudentDemographicRecord.

7. Can it be assumed that every SIF_Message includes a unique identifier for each district in the Agent_ID field? If not, is this available in another field for all messages?

OMES Answer 7: Yes. By ZoneID

8. What objects, if any, are expected to publish SIF_Events by the offered system?

OMES Answer 8: StudentRecordExchange object

Page comment added by Carmen Cavolo

Hosting

1. Is there a benefit for some districts, for example the larger ones, to host the offered solution within their district's data center while still having the smaller ones hosted by the OSDE?

OMES Answer: Possibly. SDE has not explored that option.

2. Does the OMES prefer a web hosted application OR and application hosted by OSDE?

OMES Answer: There is no preference. It would depend on the situation.



Training

1. Is there is a centralized location in OK City, where all training can be conducted?

OMES Answer: Yes and no. Because the system is offered statewide the travel involved in having all staff attend training in OKC would be a cost/time issue for those coming from the farthest parts of the state. It would be preferable to offer at least initial trainings in multiple parts of the state to lessen that issue.

2. Is there a cost to use this state facility?

OMES Answer: Depends on the size of the facility needed and what is available during the training window.

3. If training will be conducted throughout the state, are their regional training facilities that can be utilized?

OMES Answer: It may be possible to utilize district owned training facilities in all parts of the state but that would have to be negotiated with the affected districts.

4. Is there a cost to use these regional facilities?

OMES Answer: It is possible that there may be districts willing to host the trainings for low/no cost but it would have to be set up with the individual districts. OSDE would facilitate the negotiations.

Page comment added by Carmen Cavolo

There appears to be no section C. 18; is that intentional?

OMES Answer: It was not intentional; however, the numbering mistake was not caught before the RFP was released.

Page comment added by Daniel Harris

What is the current total cost of the state's existing contract for these services?

OMES Answer: That information cannot be provided

Page comment added by Daniel Harris

Has the state approved a budget for the resulting contract of this request? If so, can the state share the approved term and budget amounts for this project?

OMES Answer: That has not been determined.

Page comment added by Starr Goodspeed

1. Under Section A20, Insurance, does the state want proof of insurance at the time of proposal submission or upon award?

OMES Answer 1: Insurance can be provided upon award.

2. Under A30 and A44, patents, copyrights and ownership rights, the state is requesting a COTS solution but then asks to have ownership of work provided under this contract. If the vendor is proposing its COTS solution but requires some extensions of its product to meet the specific requests of the state, are those extensions considered to be property of the



state even if unusable without the core product? If so, does this then expand the state's claims to any aspects of the COTS product?

OMES Answer 2: This General Provision may be negotiated with the potential vendors.

3. C.1, would you please indicate what programs you are currently using for IFSP, 504, and IEPs and whether the state is satisfied with their current product and vendors?

OMES Answer 3: IFSP's are managed through an in house built system in SQL/.NET, 504 and IEP's are managed through a vendor system called SEAS. This RFP is in response to the current contract ending, there have been no issues with the current contract.

4. C.1, regarding hosting does the state have a preference as to self hosting or vendor hosted? Does the state prefer pricing out both options for its consideration?

OMES Answer 4: We do not have a preference, in the RFP we asked for pricing for both options.

5. C.2, please identify what the state's SIS system is currently. Does the state intend to continue to use that system?

OMES Answer 5: The SIS system is a custom developed system that pulls information nightly from the 500+ school districts. Yes we plan to continue to use this system.

6. C.2, what is the version of SIF that the state is currently using? If the vendor has a proprietary tool that it can provide for data exchange at no cost would the state be interested in considering that alternative to SIF?

OMES Answer 6: Please see the requirements for the Wave here:
http://www.ok.gov/sde/sites/ok.gov.sde/files/2.x%20Wave%20Requirements_v1.6.pdf

We would prefer SIF, however an alternative may be considered.

7. C.2 Is the current single sign between the SIS and the IFSP, 504 and IEP products?

OMES Answer 7. The current Single Sign On is in use for the State SIS and IFSP system, but it is not currently being used for the IEP and 504 system.

8. C.3 Under C.3.11 and C.11.8, the state asks for data conversion services. Does the state want a specific volume of data from previous systems moved into the new system? If so, please define the scope of this work.

OMES Answer 8: Yes we would like all historical data from the current system transferred to the new system. There is 9 years of data in the current system.

9. C.14, training – Does the state prefer the train the trainer approach or direct end user training? Of TTT, how many trainers does the state want included? If end user training, how many people would we train? Would the training occur throughout the state or in a single location?

OMES Answer 9: There is not a preference of the types of training to be provided, this will be determined based on the cost and availability of funds. For the Train the Trainer model we would assume that one or more people from the district would be trained and they would be responsible for training other members on their district team. For example the Special Education Coordinator at District A may attend the training and then be responsible for training their Special Education Specialists. For the end user training we would expect the training to be to the Special Education Specialists.



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We would expect the training to occur throughout the state perhaps in regions, so that more rural districts did not have to travel so far. We do not have estimates at this time on how many would attend these types of trainings. We would want the vendor to tell us how big a class can be and how much per class and then we will determine how many trainings we would like to pay for.

10. G.4 Per User Rate – How many records should we anticipate when preparing the per student price?

OMES Answer 10: Per section C.1 in the RFP “This transactional system will be implemented statewide to serve 80,000 students and eventually expanded to serve 133,000 students statewide”