



Solicitation Cover Page

1. Solicitation #: 309000042

2. Solicitation Issue Date: 8/23/2019

3. Brief Description of Requirement:

Office of Management and Enterprise Services/Central Purchasing, on behalf of Oklahoma Emergency Management, is seeking services for a managing agency for disaster case management for the flooding event declaration during the period of May 7, 2019 - June 9, 2019.

4. Response Due Date¹: 09/20/2019

Time: 3:00 P.M. CST/CDT

5. Issued By and **RETURN SEALED BID TO**²:

U.S. Postal Delivery Address: 5005 N. Lincoln Blvd

Oklahoma City, OK 73105

Common Carrier Delivery Address: 5005 N. Lincoln Blvd

Oklahoma City, OK 73105

Electronic Submission Address: N/A

6. Solicitation Type (type "X" at one below):

- Invitation to Bid
- Request for Proposal
- Request for Quote

7. Contracting Officer:

Name: Richard Williams
 Phone: 405-522-1040
 Email: Richard.Williams@omes.ok.gov

¹ Amendments to solicitation may change the Response Due Date (read GENERAL PROVISIONS, section 3, "Solicitation Amendments")

² If "U.S. Postal Delivery" differs from "Carrier Delivery", use "Carrier Delivery" for courier or personal deliveries



Responding Bidder Information

"Certification for Competitive Bid and Contract" MUST be submitted along with the response to the Solicitation.

1. RE: Solicitation # 3090000042

2. Bidder General Information:

FEI / SSN : _____ Supplier ID: _____
Company Name: _____

3. Bidder Contact Information:

Address: _____
City: _____ State: ____ Zip Code: _____
Contact Name: _____
Contact Title: _____
Phone #: _____ Fax #: _____
Email: _____ Website: _____

4. Oklahoma Sales Tax Permit¹:

- YES – Permit #: _____
- NO – Exempt pursuant to Oklahoma Laws or Rules – Attach an explanation of exemption

5. Registration with the Oklahoma Secretary of State:

- YES - Filing Number: _____
- NO - Prior to the contract award, the successful bidder will be required to register with the Secretary of State or must attach a signed statement that provides specific details supporting the exemption the supplier is claiming (www.sos.ok.gov or 405-521-3911).

6. Workers' Compensation Insurance Coverage:

Bidder is required to provide with the bid a certificate of insurance showing proof of compliance with the Oklahoma Workers' Compensation Act.

- YES – Include with the bid a certificate of insurance.
- NO – Exempt from the Workers' Compensation Act pursuant to 85A O.S. § 2(18)(b)(1-11) – Attach a written, signed, and dated statement on letterhead stating the reason for the exempt status.²

¹ For frequently asked questions concerning Oklahoma Sales Tax Permit, see <https://www.ok.gov/tax/Businesses/index.html>

² For frequently asked questions concerning workers' compensation insurance, see <https://www.ok.gov/wcc/Insurance/index.html>

7. Disabled Veteran Business Enterprise Act

YES – I am a service-disabled veteran business as defined in 74 O.S. §85.44E. Include with the bid response 1) certification of service-disabled veteran status as verified by the appropriate federal agency, and 2) verification of not less than 51% ownership by one or more service-disabled veterans, and 3) verification of the control of the management and daily business operations by one or more service-disabled veterans.

NO – Do not meet the criteria as a service-disabled veteran business.

Authorized Signature _____ Date _____

Printed Name _____ Title _____



Certification for Competitive Bid and/or Contract (Non-Collusion Certification)

NOTE: A certification shall be included with any competitive bid and/or contract exceeding \$5,000.00 submitted to the State for goods or services.

Agency Name: Emergency Management Agency Number: 30900

Solicitation or Purchase Order #: 3090000042

Supplier Legal Name: _____

SECTION I [74 O.S. § 85.22]:

A. For purposes of competitive bid,

1. I am the duly authorized agent of the above named bidder submitting the competitive bid herewith, for the purpose of certifying the facts pertaining to the existence of collusion among bidders and between bidders and state officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to said bid;
2. I am fully aware of the facts and circumstances surrounding the making of the bid to which this statement is attached and have been personally and directly involved in the proceedings leading to the submission of such bid; and
3. Neither the bidder nor anyone subject to the bidder's direction or control has been a party:
 - a. to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding,
 - b. to any collusion with any state official or employee as to quantity, quality or price in the prospective contract, or as to any other terms of such prospective contract, nor
 - c. in any discussions between bidders and any state official concerning exchange of money or other thing of value for special consideration in the letting of a contract, nor
 - d. to any collusion with any state agency or political subdivision official or employee as to create a sole-source acquisition in contradiction to Section 85.45j.1. of this title.

B. I certify, if awarded the contract, whether competitively bid or not, neither the contractor nor anyone subject to the contractor's direction or control has paid, given or donated or agreed to pay, give or donate to any officer or employee of the State of Oklahoma any money or other thing of value, either directly or indirectly, in procuring this contract herein.

SECTION II [74 O.S. § 85.42]:

For the purpose of a contract for services, the supplier also certifies that no person who has been involved in any manner in the development of this contract while employed by the State of Oklahoma shall be employed by the supplier to fulfill any of the services provided for under said contract.

The undersigned, duly authorized agent for the above named supplier, by signing below acknowledges this certification statement is executed for the purposes of:

the competitive bid attached herewith and contract, if awarded to said supplier;

OR

the contract attached herewith, which was not competitively bid and awarded by the agency pursuant to applicable Oklahoma statutes.

Supplier Authorized Signature

Certified This Date

Printed Name

Title

Phone Number

Email

Fax Number

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A. GENERAL PROVISIONS

A.1. Definitions

As used herein, the following terms shall have the following meaning unless the context clearly indicates otherwise:

- A.1.1. "Acquisition" means items, products, materials, supplies, services, and equipment an entity acquires by purchase, lease purchase, lease with option to purchase, or rental;
- A.1.2. "Addendum" means a written restatement of or modification to a Contract Document executed by the Supplier and State.
- A.1.3. "Bid" means an offer in the form of a bid, proposal, or quote a bidder submits in response to a solicitation;
- A.1.4. "Bidder" means an individual or business entity that submits a bid in response to a solicitation;
- A.1.5. "Solicitation" means a request or invitation by the State Purchasing Director or a state agency for a supplier to submit a priced offer to sell acquisitions to the state. A solicitation may be an invitation to bid, request for proposal, or a request for quotation; and
- A.1.6. "Supplier" or "vendor" means an individual or business entity that sells or desires to sell acquisitions to state agencies.

A.2. Bid Submission

- A.2.1. Submitted bids shall be in strict conformity with the instructions to bidders and shall be submitted with a completed Responding Bidder Information, OMES-FORM-CP-076, and any other forms required by the solicitation.
- A.2.2. Bids shall be submitted to the Central Purchasing Division in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.
- A.2.3. The required certification statement, "Certification for Competitive Bid and/or Contract (Non-Collusion Certification)", OMES-FORM-CP-004, must be made out in the name of the bidder and must be properly executed by an authorized person, with full knowledge and acceptance of all its provisions.
- A.2.4. All bids shall be legible and completed in ink or with electronic printer or other similar office equipment. Any corrections to bids shall be identified and initialed in ink by the bidder. Penciled bids and penciled corrections shall NOT be accepted and will be rejected as non-responsive. In addition to a hard copy submittal, the bidder will also be required to submit an electronic copy. Electronic responses must be submitted in the identical format contained in the solicitation (for example Microsoft Word, Microsoft Excel, but not Adobe PDF). In the event the hard copy of the price worksheets and electronic copy of the price worksheets do not agree, the electronic copy will prevail.
- A.2.5. All bids submitted shall be subject to the Oklahoma Central Purchasing Act, Central Purchasing Rules, and other statutory regulations as applicable, these General Provisions, any Special Provisions, solicitation specifications, required certification statement, and all other terms and conditions listed or attached herein—all of which are made part of this solicitation.

A.3. Solicitation Amendments

- A.3.1. If an "Amendment of Solicitation", OMES-FORM-CP-011, is issued, the bidder shall acknowledge receipt of any/all amendment(s) to solicitations by signing and returning the solicitation amendment(s). Amendment acknowledgement(s) may be submitted with the bid or may be forwarded separately. If forwarded separately, amendment acknowledgement(s) must contain the solicitation number and response due date and time on the front of the envelope. The Central Purchasing Division must receive the amendment acknowledgement(s) by the response due

date and time specified for receipt of bids for the bid to be deemed responsive. Failure to acknowledge solicitation amendments may be grounds for rejection.

- A.3.2. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the solicitation. All amendments to the solicitation shall be made in writing by the Central Purchasing Division.
- A.3.3. It is the bidder's responsibility to check the OMES/Central Purchasing Division website frequently for any possible amendments that may be issued. The Central Purchasing Division is not responsible for a bidder's failure to download any amendment documents required to complete a solicitation.

A.4. Bid Change

If the bidder needs to change a bid prior to the solicitation response due date, a new bid shall be submitted to the Central Purchasing Division with the following statement "This bid supersedes the bid previously submitted" in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.

A.5. Certification Regarding Debarment, Suspension, and Other Responsibility Matters

By submitting a response to this solicitation:

- A.5.1. The prospective primary participant and any subcontractor certifies to the best of their knowledge and belief, that they and their principals or participants:
 - A.5.1.1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal, State or local department or agency;
 - A.5.1.2. Have not within a three-year period preceding this proposal been convicted of or pled guilty or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) contract; or for violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - A.5.1.3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph A.5.1.2. of this certification; and
 - A.5.1.4. Have not within a three-year period preceding this application/proposal had one or more public (Federal, State, or local) contracts terminated for cause or default.
- A.5.2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to its solicitation response.

A.6. Bid Opening

Sealed bids shall be opened by the Central Purchasing Division at 5005 N. Lincoln Blvd. Suite 300, Oklahoma City, Oklahoma, 73105 at the time and date specified in the solicitation as Response Due Date and Time.

A.7. Open Bid / Open Record

Pursuant to the Oklahoma Public Open Records Act, a public bid opening does not make the bid(s) immediately accessible to the public. The procurement or contracting agency shall keep the bid(s) confidential, and provide prompt and reasonable access to the records only after a contract is awarded or the solicitation is cancelled. This practice protects the integrity of the competitive bid process and prevents excessive disruption to the procurement process. The interest of achieving the best value for the State of Oklahoma outweighs the interest of vendors immediately knowing the contents of competitor's bids. [51 O.S. § 24A.5(5)]

Additionally, financial or proprietary information submitted by a bidder may be designated by the Purchasing Director as confidential and the procurement entity may reject all requests to disclose information designated as confidential pursuant to 62 O.S. (2012) § 34.11.1(H)(2) and 74 O.S. (2011) § 85.10. Bidders claiming any portion of their bid as proprietary or confidential must specifically identify what documents or portions of documents they consider confidential and identify applicable law supporting their claim of confidentiality. The State Purchasing Director shall make the final decision as to whether the documentation or information is confidential pursuant to 74 O.S. §

85.10. Otherwise, documents and information a bidder submits as part of or in connection with a bid are public records and subject to disclosure after contract award or the solicitation is cancelled.

A.8. Late Bids

Bids received by the Central Purchasing Division after the response due date and time shall be deemed non-responsive and shall NOT be considered for any resultant award.

A.9. Legal Contract

- A.9.1. Submitted bids are rendered as a legal offer and any bid, when accepted by the Central Purchasing Division, shall constitute a contract.
- A.9.2. The Contract resulting from this solicitation may consist of the following documents in the following order of precedence:
 - A.9.2.1. Any Addendum to the Contract;
 - A.9.2.2. Purchase order, as amended by Change Order (if applicable);
 - A.9.2.3. Solicitation, as amended (if applicable); and
 - A.9.2.4. Successful bid (including required certifications), to the extent the bid does not conflict with the requirements of the solicitation or applicable law.
- A.9.3. Any contract(s) awarded pursuant to the solicitation shall be legibly written or typed.

A.10. Pricing

- A.10.1. Bids shall remain firm for a minimum of sixty (60) days from the solicitation closing date.
- A.10.2. Bidders guarantee unit prices to be correct.
- A.10.3. In accordance with 74 O.S. §85.40, ALL travel expenses to be incurred by the supplier in performance of the Contract shall be included in the total bid price/contract amount.

A.11. Manufacturers' Name and Approved Equivalent

Unless otherwise specified in the solicitation, manufacturers' names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition. Bidder may offer any brand for which they are an authorized representative, and which meets or exceeds the specification for any item(s). However, if bids are based on equivalent products, indicate on the bid form the manufacturer's name and number. Bidder shall submit sketches, descriptive literature, and/or complete specifications with their bid. Reference to literature submitted with a previous bid will not satisfy this provision. The bidder shall also explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. Bids that do not comply with these requirements are subject to rejection.

A.12. Clarification of Solicitation

- A.12.1. Clarification pertaining to the contents of this solicitation shall be directed in writing to the Central Purchasing Contracting Officer specified in the solicitation, and must be prior to the closing date of the solicitation.
- A.12.2. If a bidder fails to notify the State of an error, ambiguity, conflict, discrepancy, omission or other error in the SOLICITATION, known to the bidder, or that reasonably should have been known by the bidder, the bidder shall submit a bid at its own risk; and if awarded the contract, the bidder shall not be entitled to additional compensation, relief, or time, by reason of the error or its later correction. If a bidder takes exception to any requirement or specification contained in the SOLICITATION, these exceptions must be clearly and prominently stated in their response.
- A.12.3. Bidders who believe proposal requirements or specifications are unnecessarily restrictive or limit competition may submit a written request for administrative review to the contracting officer listed on the solicitation. This request must be made prior to the closing date of the solicitation.

A.13. Negotiations

- A.13.1. In accordance with Title 74 §85.5, the State of Oklahoma reserves the right to negotiate with one, selected, all or none of the vendors responding to this solicitation to obtain the best value for the State. Negotiations could entail discussions on products, services, pricing, contract terminology or any other issue that may mitigate the State's risks. The State shall consider all issues negotiable and not artificially constrained by internal corporate policies. Negotiation may be with one or more vendors, for any and all items in the vendor's offer.
- A.13.2. Firms that contend that they lack flexibility because of their corporate policy on a particular negotiation item shall face a significant disadvantage and may not be considered. If such negotiations are conducted, the following conditions shall apply:
- A.13.3. Negotiations may be conducted in person, in writing, or by telephone.
- A.13.4. Negotiations shall only be conducted with potentially acceptable offers. The State reserves the right to limit negotiations to those offers that received the highest rankings during the initial evaluation phase.
- A.13.5. Terms, conditions, prices, methodology, or other features of the bidders offer may be subject to negotiations and subsequent revision. As part of the negotiations, the bidder may be required to submit supporting financial, pricing, and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the offer.
- A.13.6. The requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the State determines that a change in such requirements is in the best interest of the State Of Oklahoma.

A.14. Rejection of Bid

The State reserves the right to reject any bids that do not comply with the requirements and specifications of the solicitation. A bid may be rejected when the bidder imposes terms or conditions that would modify requirements of the solicitation or limit the bidder's liability to the State. Other possible reasons for rejection of bids are listed in OAC 260:115-7-32.

A.15. Award of Contract

- A.15.1. The State Purchasing Director may award the Contract to more than one bidder by awarding the Contract(s) by item or groups of items, or may award the Contract on an ALL OR NONE basis, whichever is deemed by the State Purchasing Director to be in the best interest of the State of Oklahoma.
- A.15.2. Contract awards will be made to the lowest and best bidder(s) unless the solicitation specifies that best value criteria is being used.
- A.15.3. In order to receive an award or payments from the State of Oklahoma, suppliers must be registered. The vendor registration process can be completed electronically through the OMES website at the following link: <https://www.ok.gov/dcs/vendors/index.php>.

A.16. Contract Modification

- A.16.1. The Contract is issued under the authority of the State Purchasing Director who signs the Contract. The Contract may be modified only through a written Addendum, signed by the State Purchasing Director and the supplier.
- A.16.2. Any change to the Contract, including but not limited to the addition of work or materials, the revision of payment terms, or the substitution of work or materials, directed by a person who is not specifically authorized by the Central Purchasing Division in writing, or made unilaterally by the supplier, is a breach of the Contract. Unless otherwise specified by applicable law or rules, such changes, including unauthorized written Addendums, shall be void and without effect, and the supplier shall not be entitled to any claim under this Contract based on those changes. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the resultant Contract.

A.17. Delivery, Inspection and Acceptance

- A.17.1. Unless otherwise specified in the solicitation or awarding documents, all deliveries shall be F.O.B. Destination. The supplier(s) awarded the Contract shall prepay all packaging, handling,

shipping and delivery charges and firm prices quoted in the bid shall include all such charges. All products and/or services to be delivered pursuant to the Contract shall be subject to final inspection and acceptance by the State at destination. "Destination" shall mean delivered to the receiving dock or other point specified in the purchase order. The State assumes no responsibility for goods until accepted by the State at the receiving point in good condition. Title and risk of loss or damage to all items shall be the responsibility of the supplier until accepted by the receiving agency. The supplier(s) awarded the Contract shall be responsible for filing, processing, and collecting any and all damage claims accruing prior to acceptance.

- A.17.2. Supplier(s) awarded the Contract shall be required to deliver products and services as bid on or before the required date. Deviations, substitutions or changes in products and services shall not be made unless expressly authorized in writing by the Central Purchasing Division.

A.18. Invoicing and Payment

- A.18.1. Upon submission of an accurate and proper invoice, the invoice shall be paid in arrears after products have been delivered or services provided and in accordance with applicable law. Invoices shall contain the purchase order number, a description of the products delivered or services provided, and the dates of such delivery or provision of services. An invoice is considered proper if sent to the proper recipient and goods or services have been received.
- A.18.2. State Acquisitions are exempt from sales taxes and federal excise taxes.
- A.18.3. Pursuant to 74 O.S. §85.44(B), invoices will be paid in arrears after products have been delivered or services provided.
- A.18.4. Payment terms will be net 45. Interest on late payments made by the State of Oklahoma is governed by 62 O.S. § 34.72.
- A.18.5. Additional terms which provide discounts for earlier payment may be evaluated when making an award. Any such additional terms shall be no less than ten (10) days increasing in five (5) day increments up to thirty (30) days. The date from which the discount time is calculated shall be the date of a proper invoice.

A.19. Tax Exemption

State agency acquisitions are exempt from sales taxes and federal excise taxes. Bidders shall not include these taxes in price quotes.

A.20. Audit and Records Clause

- A.20.1. As used in this clause, "records" includes books, documents, accounting procedures and practices, and other data, regardless of type and regardless of whether such items are in written form, in the form of computer data, or in any other form. In accepting any Contract with the State, the successful bidder(s) agree any pertinent State or Federal agency will have the right to examine and audit all records relevant to execution and performance of the resultant Contract.
- A.20.2. The successful supplier(s) awarded the Contract(s) is required to retain records relative to the Contract for the duration of the Contract and for a period of seven (7) years following completion and/or termination of the Contract. If an audit, litigation, or other action involving such records is started before the end of the seven (7) year period, the records are required to be maintained for two (2) years from the date that all issues arising out of the action are resolved, or until the end of the seven (7) year retention period, whichever is later.

A.21. Non-Appropriation Clause

The terms of any Contract resulting from the solicitation and any Purchase Order issued for multiple years under the Contract are contingent upon sufficient appropriations being made by the Legislature or other appropriate government entity. Notwithstanding any language to the contrary in the solicitation, purchase order, or any other Contract document, the procuring agency may terminate its obligations under the Contract if sufficient appropriations are not made by the Legislature or other appropriate governing entity to pay amounts due for multiple year agreements. The Requesting (procuring) Agency's decisions as to whether sufficient appropriations are available shall be accepted by the supplier and shall be final and binding.

A.22. Choice of Law

Any claims, disputes, or litigation relating to the solicitation, or the execution, interpretation, performance, or enforcement of the Contract shall be governed by the laws of the State of Oklahoma.

A.23. Choice of Venue

Venue for any action, claim, dispute or litigation relating in any way to the Contract shall be in Oklahoma County, Oklahoma.

A.24. Termination for Cause

- A.24.1. The supplier may terminate the Contract for default or other just cause with a 30-day written request and upon written approval from the Central Purchasing Division. The State may terminate the Contract for default or any other just cause upon a 30-day written notification to the supplier.
- A.24.2. The State may terminate the Contract immediately, without a 30-day written notice to the supplier, when violations are found to be an impediment to the function of an agency and detrimental to its cause, when conditions preclude the 30-day notice, or when the State Purchasing Director determines that an administrative error occurred prior to Contract performance.
- A.24.3. If the Contract is terminated, the State shall be liable only for payment for products and/or services delivered and accepted.

A.25. Termination for Convenience

- A.25.1. The State may terminate the Contract, in whole or in part, for convenience if the State Purchasing Director determines that termination is in the State's best interest. The State Purchasing Director shall terminate the Contract by delivering to the supplier a Notice of Termination for Convenience specifying the terms and effective date of Contract termination. The Contract termination date shall be a minimum of 60 days from the date the Notice of Termination for Convenience is issued by the State Purchasing Director.
- A.25.2. If the Contract is terminated, the State shall be liable only for products and/or services delivered and accepted, and for costs and expenses (exclusive of profit) reasonably incurred prior to the date upon which the Notice of Termination for Convenience was received by the supplier.

A.26. Insurance

The successful supplier(s) awarded the Contract shall obtain and retain insurance, including workers' compensation, automobile insurance, medical malpractice, and general liability, as applicable, or as required by State or Federal law, prior to commencement of any work in connection with the Contract. The supplier awarded the Contract shall timely renew the policies to be carried pursuant to this section throughout the term of the Contract and shall provide the Central Purchasing Division and the procuring agency with evidence of such insurance and renewals.

A.27. Employment Relationship

The Contract does not create an employment relationship. Individuals performing services required by this Contract are not employees of the State of Oklahoma or the procuring agency. The supplier's employees shall not be considered employees of the State of Oklahoma nor of the procuring agency for any purpose, and accordingly shall not be eligible for rights or benefits accruing to state employees.

A.28. Compliance with the Oklahoma Taxpayer and Citizen Protection Act of 2007

By submitting a bid for services, the bidder certifies that they, and any proposed subcontractors, are in compliance with 25 O.S. 1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and available at www.dhs.gov/E-Verify.

A.29. Compliance with Applicable Laws

The products and services supplied under the Contract shall comply with all applicable Federal, State, and local laws, and the supplier shall maintain all applicable licenses and permit requirements.

A.30. Special Provisions

Special Provisions set forth in SECTION B apply with the same force and effect as these General Provisions. However, conflicts or inconsistencies shall be resolved in favor of the Special Provisions.

B. SPECIAL PROVISIONS

B.1. Contract Period

- B.1.1.** Initial contract award is for twenty-one (21) months for the period beginning with the declaration initiated on June 1, 2019 through May 2021.
- B.1.2.** Contract may be extended for additional 90-day period(s) at the discretion of the awarding agency.

B.2. FEMA Grant Approval

Award of RFP will be contingent upon FEMA approval of facilitating grant.

B.3. Definitions

As used herein, in addition to the definitions listed in A.1., the following terms are specific to the services being solicited:

- B.3.1.** ARC - American Red Cross
- B.3.2.** CAN -Coordinated Assistance Network
- B.3.3.** CCA-Construction Cost Analyst
- B.3.4.** CM – Case Management
- B.3.5.** DCM – Disaster Case Management
- B.3.6.** DCMP - Disaster Case Management Program
- B.3.7.** FEMA - Federal Emergency Management Agency
- B.3.8.** IA - Individual Assistance
- B.3.9.** LTRG -Long Term Recovery Group
- B.3.10.** MA - Managing Agency
- B.3.11.** MARC - Multi-Agency Resource Centers
- B.3.12.** MPLA - Managing and Provider Level Agencies
- B.3.13.** OEM – Oklahoma Department of Emergency Management
- B.3.14.** OK DCMP - Oklahoma Disaster Case Management Program
- B.3.15.** OK VOAD - Oklahoma Voluntary Organization Active in Disaster
- B.3.16.** PA - Public Assistance
- B.3.17.** PLA - Provider Level Agencies
- B.3.18.** RFP - Request for Proposal

B.4. Contract Funding

- B.4.1.** Funding and issuance of this proposed agreement is contingent upon the availability of sufficient resources provided through federal funding. No legal responsibility for payment on the part of OEM shall be made, unless and until funds are appropriated and made available to OEM. OEM assumes no responsibility or liability for the costs incurred by an Applicant for the planning or preparing of a proposal in response to this Request for Proposal (RFP).
- B.4.2.** Because this Project is funded by federal funds, procurement standards found in the 2 CFR 200.317-328 must be used. Contracting with small and minority business, women's business enterprises, and labor surplus area firms must be considered.
- B.4.3.** There are no match requirements for this program (100% federal share)
- B.4.4.** No ceiling cost (the budget must be developed within the parameters of the allowable expenditures listed on budget worksheet). Staffing costs should be submitted as monthly per employee costs. Cost should include (LIST ALL INCLUDED BENEFITS, EQUIPMENT, SUPPLIES, LICENSES, RENT, ETC). Bids will be evaluated based on most economical overall cost and are not permitted to exceed the total budget per line item submitted to FEMA.

B.5. Mandatory Vendor Registration for Contract Award (In Addition to Section A.15.3)

- B.5.1.** Acquisitions issued by agencies under the authority of Title 74 require vendors to register with Central Purchasing prior to award. Vendors will not be required to register to submit a bid response but will be required to register prior to being awarded a contract and renew their registration prior to each renewal of an award.
- B.5.2.** Vendors pending contract award to a bid released by the Central Purchasing Division or other Oklahoma state agency MUST register with the state.

Online Registration: <https://www.ok.gov/dcs/vendors2/app/index.php>

- B.5.2.1.** Pursuant to 74 O.S. § 85.33.B: o A vendor may register with the Central Purchasing Division to be placed on the Supplier List for bid notification.
 - B.5.2.2.** Registration entitles a supplier to receive all bid notices for the commodity classes specified by the vendor in the registration process for a period of one year.
 - B.5.2.3.** The Vendor Registration fee is **\$25 for EACH** family code for which the vendor desires registration.
 - B.5.2.4.** The following items describe information requested by the vendor registration application. To expedite the application process, vendors are encouraged to have the information readily available prior to beginning the registration application. If your company is not currently transacting business in the State of Oklahoma, you may not have some of the items listed. However, any vendor selected for award of a contract with the state of Oklahoma must meet the requirements prior to the issuance of a purchase order.
 - B.5.2.5.** E-mail address - if possible, we encourage all vendors to create a central e-mail address, to which all state bidding e-mail correspondence can be sent. A central e-mail for your organization will assure personnel changes or employee absences do not inhibit your ability to receive timely notifications of State bidding opportunities.
 - B.5.2.6.** An Oklahoma Sales Tax Permit Number and its Expiration Date or explanation of the exemption status (FAQs)
 - B.5.2.7.** An Oklahoma Secretary of State Filing Number, or explanation of the exemption status (www.sos.ok.gov or 405-521-3911)
 - B.5.2.8.** A Workers Compensation Insurance Certificate (PDF file) or explanation of the exemption status (FAQs)
 - B.5.2.9.** Vendors must complete all 12 steps of the registration application, which require business information about your company, a substitute W-9 form and designation of the commodity codes/classifications your company is interested in. We recommend vendors search UNSPSC Website Code Posting to identify the applicable commodity codes prior to beginning the registration application. However, you will have the option to select and deselect a family, class and commodity during the online registration process before finalizing your application.
 - B.5.2.10.** Payment information related to a bank checking account (example), or VISA, MasterCard or American Express credit card. All payments are made through an encrypted secure server and payment information is not stored after a transaction. You will receive confirmation after your registration is validated and approved by the Vendor Registration Officer.
- B.5.3.** Note to Vendors: The State of Oklahoma does NOT provide legal advice regarding exemptions from Sales Tax Permit, Secretary of State, and Workers Compensation Insurance registrations

B.6. Advance Payments Prohibited

OEM shall not make payments in advance of or in anticipation of goods or services.

B.7. Assignment and Delegation

The service to be performed under this contract shall not be subcontracted, in whole or in part, to any other person or entity without the prior written consent of OEM. If the contractor cannot perform the services as identified in this contract, the contractor will be responsible for subcontracting the services or making alternative arrangements for the provisions of the services. The terms of this contract shall be included in any subcontract. The contractor will be liable for all additional costs and expenses arising from such subcontract or substitution to cover performance. Approval of any subcontract shall not relieve the contractor of any responsibility for performance under this contract.

B.8. Contractor's Relation to OEM

The contractor is in all respects an independent contractor and is neither an agent nor an employee of OEM. Neither the contractor nor any of its officers, employees, agents, or members shall have authority to bind OEM, nor are they entitled to any of the benefits or worker's compensation provided by OEM to its employees. Please refer to A.27.

B.9. Accessibility Standards

- B.9.1.** OEM may review, test, evaluate and monitor vendor's documentation and technical support for compliance with the Accessibility Standards. Review, testing, evaluation and monitoring may be conducted before and after the award of a contract. Testing and monitoring may include user acceptance testing.
- B.9.2.** Neither the review, testing (including acceptance testing), evaluation, or monitoring of any product, nor the absence of such review, testing, evaluation, or monitoring, will result in a waiver of OEM's right to contest the contractor's assertion of compliance with the Accessibility Standards.

B.10. Draft Invoice

NOTE TO SUPPLIERS: The State of Oklahoma is working to streamline the process of payment to suppliers and to reduce the timeframe of payment. When submitting your response, please also include a draft invoice (that is like your original invoices) with the item(s) and pricing. Please make sure that it is marked as "Draft Invoice". The intent of this is to match our purchase orders to an invoice whenever possible; however, unless there is some overriding reason for a marked difference, the invoice should closely match the RFP items and pricing. Please note that if your company is awarded and issued a purchase order, you will still need to submit a proper invoice after the purchase order has been issued and you have provided the item(s)/services(s) to the agency. Also, please be sure and put in bold letters "THIS IS NOT A BILL" in addition to marking it as a draft invoice. Invoices should contain supporting documentation for every item billed. OEM can provide further clarification as to qualifications for supporting documentation required. Supporting documentation must validate expense is allowable, reasonable, necessary and allocable under 2 CFR 200.

B.11. Minor Deficiencies or Informalities

- B.11.1.** "Minor deficiency" or "minor informality" means an immaterial defect in a bid or variation in a bid from the exact requirements of a solicitation that may be corrected or waived without prejudice to other bidders. A minor deficiency or informality does not affect the price, quantity, quality, delivery or conformance to specifications and is negligible in comparison to the total cost or scope of the acquisition.
- B.11.2.** The State Purchasing Director may waive minor deficiencies or informalities in a bid if the State Purchasing Director determines the deficiencies or informalities do not prejudice the rights of other bidders, or are not a cause for bid rejection.

B.12. Hold Harmless

Proposed Supplier agrees to hold harmless OEM and its Trustees, officers, servants, employees, agents and consultants, against any claims, demands and liabilities resulting from any act or omission on the part of the Supplier and/or agents, subcontractors, servants, and employees thereof in the performance of this contract.

B.13. Gratuities

The rights of Supplier under the terms of this Contract may be immediately terminated, in whole or in part, by written notice if it is determined that the Supplier, its employee, agent or another representative offered or gave a gratuity (e.g., an entertainment or gift) to any State employee directly involved in this Contract. In addition, a Supplier determined to be guilty of such a violation may be suspended or debarred.

C. SOLICITATION SPECIFICATIONS

C.1. Introduction

OEM is requesting proposals from interested and qualified private-non-profit agencies to serve as Managing Agency (MAs) for the provision of Disaster Case Management Program (DCMP) services. Qualified Managing Agencies are defined as agencies that have at least five (5) years of prior Case Management experience and training. (OEM can provide Disaster Case Management Training) Public agencies are not eligible to apply. (State agencies can apply for sub-recipient only).

C.2. Overview

C.2.1. Disaster Description

- C.2.1.1. Incident Date:** May 7, 2019 – June 9, 2019
- C.2.1.2. IA Declaration Date:** June 1, 2019
- C.2.1.3. Disaster Type:** Severe Storms, Tornadoes, Straight-line Winds, and Flooding
- C.2.1.4. Concentration of Damage:** Statewide with IA Declaration in 27 counties
- C.2.1.5. Brief Description of the Geographic Area Impacted**
 - C.2.1.5.1.** On June 1, 2019, a Presidential Disaster Declaration presented to the State of Oklahoma (FEMA-DR-4438-OK) for the incident period of May 7, 2019 through June 9, 2019. The expedited declaration provided Individual Assistance (IA) to Muskogee, Tulsa and Wagoner counties. The American Red Cross (ARC) initiated sheltering operations along with local faith-based organizations, and later, in partnership with Oklahoma Voluntary Organization Active in Disaster (OKVOAD), established Multi-Agency Resource Centers (MARC) to assist survivors with immediate resource needs. Inclement weather continued, and required support by local voluntary agencies, tribal and faith-based organizations. The OKVOAD continue to support impacted areas as they exhaust their local and state resources.
 - C.2.1.5.2.** Due to the large geographical areas impacted, effective disaster case management must be a coordinated approach to address the short and long-term physical, spiritual and emotional needs of counties and tribal jurisdictions.

Designated Counties	FEMA Registrations as of August 2, 2019	Designated Counties	FEMA Registrations as of August 2, 2019
Alfalfa	35	Nowata	95

Canadian	190	Okmulgee	106
Cherokee	101	Osage	265
Craig	72	Ottawa	190
Creek	355	Pawnee	59
Delaware	211	Payne	145
Garfield	51	Pottawatomie	55
Kay	251	Rogers	223
Kingfisher	54	Sequoyah	123
Le Flore	48	Tulsa	1,209
Logan	123	Wagoner	226
Mayes	160	Washington	128
Muskogee	560	Woods	39
Noble	45	TOTAL	5,119
Total Registrations (including Undeclared Counties)		TOTAL	5,249

C.2.1.6. FEMA AMENDMENTS in effect

C.2.1.6.1. With the severe storms being so widespread FEMA and the Oklahoma Department of Emergency Management (OEM) conducted many joint damage assessments for the incident period over the course of several week. The following amendments were added to the original Federal Disaster Declaration, DR-4438-OK:

C.2.1.6.2. On June 8, 2019, Amendment one (1) added seven (7) additional counties to the disaster declaration FEMA 4438-DR-OK for IA. Osage County for IA had already been designated for Emergency Protective Measures (Category B), limited to direct federal assistance under Public Assistance (PA).

C.2.1.6.3. Canadian, Creek, Logan, Osage, Ottawa, Rogers and Washington

C.2.1.6.4. On June 11, 2019, Amendment two (2) added seven (7) additional counties to the disaster declaration FEMA 4438-DR-OK for Individual Assistance. Sequoyah County for IA had already been designated for Emergency Protective Measures (Category B), limited to direct federal assistance under PA.

C.2.1.6.5. Delaware, Kay, Mayes, Okmulgee, Payne, Pottawatomie, and Sequoyah

C.2.1.6.6. On June 17, 2019, Amendment three (3) added four (4) additional counties to the disaster declaration FEMA 4438-DR-OK for Individual Assistance. Le Flore and Noble counties for IA had already been designated for Emergency Protective Measures (Category B), limited to direct federal assistance under PA.

C.2.1.6.7. Cherokee, Le Flore, Noble and Nowata

C.2.1.6.8. On June 17, 2019, Amendment four (4) closes the Incident Period on June 9, 2019.

C.2.1.6.9. On June 20, 2019, Amendment five (5) added six (6) additional counties to the disaster declaration FEMA 4438-DR-OK for Individual Assistance.

C.2.1.6.10. Alfalfa, Craig, Garfield, Kingfisher, Pawnee and Woods.

C.2.1.6.11. As of June 20, 2019, twenty-seven (27) counties in the State of Oklahoma have been declared for IA. The wide geographical range of these counties is comprised of urban, sub-urban, rural and tribal areas and presents many challenges to comprehensive survivor recovery.

C.2.1.6.12. While the flooding and storms continued to impact the state, local OKVOAD organizations, private sector partners, and emergency management assisted the survivors with both response and recovery operations. Many of these resources have been exhausted by repeated non federally declared disaster events. The dispersed nature of the disaster event, the exhaustion of many resources, and large number of registrants all portend a difficult recovery without assistance for CM capacity.

C.3. Guidance and Standards

All guidance and standards of the 2 CFR 200 must be followed by the chosen contractor.

C.4. Purpose of Funding

C.4.1. OEM Individual Assistance (IA), is issuing this RFP for the DCMP Grant. The purpose of this grant is to provide a time-limited disaster case management process that will organize and provide a timely, coordinated approach to assess the client's disaster-related needs and develop a goal-oriented plan that outlines the steps necessary to achieve their recovery. OEM IA is seeking organizations to serve as Managing Level agencies for the Oklahoma Disaster Case Management Program (OK-DCMP) for DR- 4438 which includes the following Counties.

C.4.1.1. Alfalfa, Canadian, Cherokee, Craig, Creek, Delaware, Garfield, Kay, Kingfisher, Le Flore, Logan, Mayes, Muskogee, Noble, Nowata, Okmulgee, Osage, Ottawa, Pawnee, Payne, Pottawatomie, Rogers,

Sequoyah, Tulsa, Wagoner, Washington, Woods with primary damages of major flooding, tornadoes and straight-line winds that have damaged home and infrastructure.

- C.4.2.** This grant aims to provide disaster assistance applicants with a single point of contact to facilitate access to a broad range of disaster recovery resources that may be provided by different organizations. Please be advised that clinical crisis case management is NOT a part of this grant proposal.

C.5. Project Goals

- C.5.1.** This RFP is for procurement to provide long-term post disaster case management services to assist persons and households experiencing continuing adverse impacts from a presidential disaster declaration. This effort is federally funded but administered at the state level. This RFP is limited to suppliers that have recognized training and experience in providing Case Management services.
- C.5.2.** OEM intends to accomplish the following goals for DCM services in relation to the mission of this RFP:
- C.5.2.1.** Provide needed case management through procuring contracts or vendor agreements with a MA that is a disaster case management service provider with a capacity and local knowledge to provide this service;
 - C.5.2.2.** The MA must have the requisite disaster or emergency case management experience and the administrative infrastructure to effectively manage and support training, service delivery, and fiscal management processes;
 - C.5.2.3.** The MA must also be able to provide a sufficient level of accountability, technical assistance, and leadership to meet all governmental and professional requirements.
 - C.5.2.4.** The MA must demonstrate a plan to work with local case management providers and LTRGs already in place and providing services.
- C.5.3.** DCMP will be coordinated through OEM with support being provided by OKVOAD. Through the DCMP, OEM will provide the following positions to address the ongoing need for this service across the state for a time period not to exceed twenty-one (21) months unless a “no-cost extension” of 90 days has adequate justification and is approved by FEMA.

C.6. Disaster Case Management Program Positions

- C.6.1.** The following positions are examples of recommended staffing for Managing Level, and Provider Level Agencies. While it is recommended that agencies winning the bid adhere closely to these roles, exceptions can be made if requested and justified during the RFP period.

Positions for Managing Agency	Description
Program Coordinator	This position coordinates Provider Agency activity, sets training and educational priorities, mobilizes additional resources, ensures the equitable availability of as many resources as possible, establish a collaborative environment with provider agencies and long-term recovery groups, deploys CCAs to support CM activities, and coordinates all billing. This position will not formally supervise other DCMP PLA staff but establishes consistent policies for CM activities and standards such as case file review, documentation, standards for accountability, case closure reporting, and outreach and closeout standards.
Construction Cost Analyst (CCA)	This position will work under the direction of the DCMP MA Program Coordinator. The CCA will serve the IA declared areas with an emphasis on the most heavily affected counties. This position will provide determination on condition of disaster damage structures, requirement to return structure to pre-disaster condition or demolition, and prepare cost estimates.
Training Coordinator	Responsible for all trainings to be attended by MA, PLA and State Level. This position will be responsible for staff training to ensure adherence to DCMP policies and procedures as well as federal and state regulations. This position will be responsible for developing and implementing monitoring standards, procedures, and a training schedule. Will develop initial DCMP staff training and ongoing training plan to ensure staff has necessary tools to serve the needs of disaster survivors.
Resource Coordinator	This position will communicate with agencies, community members, case managers and staff to assist with grant writing, funding for unmet needs, coordination with local, state, and national partners with resources, and assist with fundraising. The Resource Coordinator (RC) will travel throughout the State to

	find, research and vet resources that can be used by the IA Disaster Recovery department and provide supportive services to assist clients in reaching recovery goals. This unique position will also require working on assignments that are complex in nature, using judgement and analysis in resolving problems and making recommendations while working with minimal supervision.
Data Coordinator	This position will be responsible for performing collection, interpretation and recording of data in accordance with OEM's standards and guidelines for data collection, retention, and safekeeping. Perform data validation and storage of various project documents, review project documents, and make necessary revisions. Sort and organize the data both hard copy and electronic versions. Provide data management updates in all internal and external meetings as required. Analyze data for quality improvement purposes, prepare data for reporting, meeting and presentations. Provide statistical and analysis and longitudinal analysis of data.
Finance Coordinator	The position will be responsible for monitoring the financial progress of the MA in connection with the DCMP Grant, processing reimbursement requests, and ensuring that financial records are complete at both the local and state level. This position will also provide technical assistance, as needed to provider agency finance staff to ensure that funds are property accounted for and used throughout the implementation of the program. Reviews reimbursement requests for completeness and eligibility of expenses.
Administrative Specialist	Duties are to assist the Program Manager and provide reports. This position will be responsible for providing clerical support for the entire DCMP team and record keeping of documents such as invoices, reimbursement requests and fiscal reports. This position will be responsible for scheduling, communications with internal and external personnel and coordination of meetings. This position will perform duties to obtain supplies, coordinate mailings and special projects are required.
Positions at Provider Level Agency	Description
Case Management Supervisor	This position will be responsible for supervising DCMP operations at the local level. Executes and supervises standard documentation practices consistent identification of applicable resources for individuals and families. This position works closely with the LTRG and communities. This position ensures the CMs are presenting case information in a confidential manner to obtain funding support for necessary unmet needs for disaster survivor recovery. Supervise disaster case management staff; ensure completeness, through and accurate case files as well as lead reporting efforts. This position will be primarily responsible for the professional development and support of CMs and the internal monitoring and evaluation of caseloads to ensure CM and client success.
Case Managers	The position will be responsible for accurate case documentation and development of resources and referrals to individuals and families. The disaster CMs will work closely with the LTRGs and present case information in a confidential manner to obtain funding support for necessary unmet needs for disaster survivor recovery. Provide direct case management services to impacted individuals and families, determine frequency of case management based on the client's needs, and able to determine and research pertinent resources for clients affected by disaster. Ratio one (1) per thirty-five (35) cases; this position will work directly with Oklahoma survivors affected by the recent disaster. Projected caseloads reflect that one (1) CM will initially be needed for the Tulsa regional locations while other case

	managers will be utilized in regional locations. CMs will work with clients to develop recovery plans and support
Data Specialist	Provider level or MA embedded in the PLAs recommended at the MA Level if the Provider Level is overwhelmed. This position will be responsible for maintaining up-to-date client records and transferring case files into the CAN System. This position will regularly monitor client files in the CAN system to ensure that CMs and resource providers have access to timely information about clients and their progress.

C.7. Amount of Available Funding

- C.7.1.** This grant funding is being made available through OEM and funded exclusively with federal funds for this RFP and will serve all of Oklahoma commensurate with the identified and documented caseload need. OEM will award a contract to the most successful proposing individual(s), firm(s), or entities for a period of twenty-one (21) months. OEM will not pay any service fees unless the contractor is awarded a Project Task/Order or a specific deliverable assignment under the RFP.
- C.7.2.** The Project Task/Order period will be from dates to be determined in accordance with progression of response to the federally declared disaster. Case management services are expected to be provided until all cases are closed or transferred to a Long-Term Recovery Committee. Project Task/Order closeout will be with all required reports submitted and all terms and conditions met on a date to be determined by OEM. OEM reserves the option to amend the term of the Project Task/Order as necessary to complete the mission of the Project Task/Order although funding is assumed to be unavailable beyond the time period of twenty-one (21) months after the date of disaster declaration.
- C.7.3.** The budget amount awarded for the life of this grant is \$885,706.53 for the MA and \$2,362,364.02 for the Provider Level agencies. Funds for PLAs may be subdivided across multiple providers.

C.8. Geographical Regions to be Served

The grant will serve all twenty-seven (27) DR-4438 IA declared counties across the State of Oklahoma, with the greater concentrations of need anticipated in the North East Quadrant of the State

C.9. Eligible Applicants

Eligible Applicants are not-for-profit agencies and limited to providers with at least five (5) years of experience providing CM that can deliver and administer the required DCM services outlined in this RFP.

C.10. Allowable Use of Funds

- C.10.1.** All funds must be committed to support and provide DCMP services commensurate with the scope of the identified caseload. The basis for payment shall be cost reimbursement of allocable, allowable, reasonable, and necessary expenses up to the total amount FEMA allows for separate budgets for case management services, administration, monitoring, and training if applicable and approved by FEMA. Committing the funds to any other service that is not part of providing DCMP services is prohibited. Supplanting or retroactive funding is not permissible. Direct reimbursement to clients is not allowable. No vehicles may be purchased or leased. All property purchased through the DCMP is retained by FEMA until dispositioned upon completion of the grant program.
- C.10.2.** The PLA shall invoice the MA monthly using an invoice format specified by OEM that will enable OEM to meet its financial reporting obligations to FEMA. The invoice shall consist of a separate summary financial report for case management services, administration, monitoring, and training, if provided by the MA under the contract with OEM. The summary financial report shall provide information for the current reporting period, previous reporting periods, and cumulative for all periods to date. The PLA will be required to submit a separate, detailed expense report for case management services, administration, monitoring, and training services to document and support the amount of outlays reported on the summary financial report. The expense report shall detail expenses by the following categories –personnel salaries and benefits, travel, supplies, training, and contractual services. The MA shall require PLA's to invoice in a manner that allows the MA to report expense by the appropriate categories. OEM reserves the right to require additional financial reporting as needed to meet the terms and conditions of the grant from FEMA.
- C.10.3.** External factors may affect the project, including budgetary and resource constraints. Any contract resulting from the RFP is subject to the availability of federal funds. As of the issuance of this RFP, the OEM reserves the right to withdraw the RFP or terminate the resulting contract without penalty.
- C.10.4.** Neither the MA nor any other person or entity acting on its behalf, including but not limited to subcontractors, employees, agents and representatives, may have a conflict of interest with respect to this procurement. The MA must describe the measures it will take to ensure that there will be no actual conflict of interest and that its fairness, independence and objectivity will be maintained.

C.11. Monitoring and Quality Control Reviews

- C.11.1.** In partnership with OEM, the PA will ensure that case managers are held to the highest possible standards. DCM supervisors will ensure that professional standards are maintained, case documentation is adequate and subject to supervisory review, and all confidentiality requirements are met. All program reports will be standardized, uniformly utilized and contain the required information by FEMA. At minimum, program reports shall include the following performance metric fields: Total Client Contacts; Number of Case Managers; Number of Case Manager Supervisors; Case Manager Supervisors/Case Managers Ratio; Number of Cases Opened; Number of Clients Completing Intake; Number of Clients Completing Needs Assessment; Number of Clients Closed with Completed Recovery Plan; Number of Cases Closed without Completed Recovery Plan; Clients in Temporary Housing; Number of Referrals; and Client's Identified Tiers. Ongoing monitoring for staff compliance will be performed by OEM DCMP Finance Monitor/Administrator
- C.11.2.1** The following information will be reported for all cases on a monthly basis: CAN Case #, Full Address, County, Case Status, Initial Outreach Date, Types of outreach completed, Case Opening Date, Initial Close Date, Case Reopening Date, Official Case Close Date, Case Manager, Volunteer hours allocated donated dollars (total case), donated dollars (contractor cost), donated dollars (material costs), included in original IHP?, reason for case closure, date of unmet needs presentation, what tribes assisted, funded from unmet needs, full needs met?, remaining unmet need dollars, types of unmet need remaining, types of needs met, are they living in primary residence?, do they intend to return to primary residence?, Status of primary residence, What is survivors current housing solution, referrals provided.
- C.11.2.** The MA will coordinate and supervise multiple PLA's, the PLA's will comply with and follow the case management policies and procedures established by the MA in order to deliver consistent services to impacted populations. The MA will be able to monitor and test the activities of the PLA's.
- C.11.3.** MA should conduct exit interviews with clients post case management services and report findings to the state and provider level agencies on a quarterly basis.
- C.11.4.** MA and PLAs must comply with the selected contractor evaluating the DCMP.

C.12. Mission Results/Scope of Work.

DATE	MILESTONE
Within 30 days after award	Contracts in place with MA and/or PLA
Within 60 days after award	PLA network in place
Within 60 days after award	Data management system ready for operations
Within 90 days after award	Initial Training of case managers
Within 90 days after award	All Declared Counties Served by CM
Within 90 days after award	All local government official affirmatively contacted
By Close of Quarter 2, December 31 st 2019	100% of first round of outreach completed
By Close of Quarter 3, March 31 st 2020	100% of second round of outreach completed
By Close of Quarter 4, June 30 th 2020	100% of third round of outreach completed
By Close of the 4 th Quarter, June 30 th 2020	33% cost of Measure of Success (1:1 return on investment ratio. amount of award should be close to the dollar amount of resources provided-labor, donated dollars, material etc.)
By Close of Quarter 6, December 31 st 2020	66% cost of Measure of Success
By Close of Quarter 8, June 30 th 2021	100% cost of Measure of Success
By Close of Quarter 2, December 31 st 2019	25% clients in sustainable housing (not total clients but the ones in unstable housing solution at the time the grant is awarded)
By Close of Quarter 4, June 30 th 2020	50% clients in sustainable housing

By Close of Quarter 6, December 31 st 2020	75% clients in sustainable housing
By Close of Quarter 8, June 30 th 2021	100% clients in sustainable housing
By 7 th of the Month	Monthly Performance Reports and Data are Due
By 15 th of Month	Monthly Invoices are due

D. EVALUATION

D.1. Proposals will be evaluated on the “best value” determination in accordance with Title 74, §85. The best value criteria for this proposal is listed below and all proposals will be reviewed and awarded based on the following evaluation criteria:

- D.1.1. Applicant Overview per Section E.4
- D.1.2. Service Goals and Objectives per Section E.5
- D.1.3. Program Approach per Section E.6
- D.1.4. Management Plan per Section E.7
- D.1.5. Service Coordination/Collaboration per Section E.8
- D.1.6. Timetable per Section E.9
- D.1.7. Budget per Section H.2
- D.1.8. Assurances per Section E.11
- D.1.9. Value Added Criteria
 - D.1.9.1. Vendors will have the option of submitting the following additional documentation for bonus points on top of the evaluation criteria for a maximum of 20 bonus points. We will consider a maximum of eight (8) letters:
 - D.1.9.1.1. Letters of intent from LTRGs or National Case Management Providers (3 points)
 - D.1.9.1.2. Letters of intent from Local Partner Provider Agencies (5 points)

E. INSTRUCTIONS TO BIDDER

E.1. Introduction

- E.1.1. Prospective Bidders are urged to read this solicitation carefully. Failure to do so will be at the Bidder’s risk. Provisions, terms, and conditions may be stated or phrased differently than in previous solicitations. Irrespective of past interpretations, practices or customs, proposals will be evaluated and any resultant contract(s) will be administered in strict accordance with the plain meaning of the contents hereof. The Bidder is cautioned that the requirements of this solicitation can be altered only by written amendment approved by the state and that verbal communications from whatever source are of no effect. In no event shall the Bidder’s failure to read and understand any term or condition in this solicitation constitute grounds for a claim after contract award.
- E.1.2. By submitting a proposal in response to this RFP, the supplier represents they have read and understand the scope of services and have familiarized itself with all federal, state, and local laws, ordinances, and rules and regulations that in any manner may affect the cost, progress, or performance of the contract work.
- E.1.3. The failure or omission of any supplier to receive or examine any form, instrument, addendum, or other documents or to acquaint itself with conditions existing will in no way relieve any supplier from any obligations with respect to its proposal or to the contract.

E.2. Submission/Copies

- E.2.1. Vendors are to submit three (3) electronic copies of their completed response, to include scanned images of the required completed and signed forms. Electronic copy can be in Word, Excel, or PDF format; but, is to be an unprotected document provided on a CD or flash drive.
- E.2.2. Faxed or emailed responses will not be accepted. Hard copies of the solicitation are not required or preferred. This requirement overrides A.2.4 of the General Provisions.

E.3. Revisions to the RFP and/or Solicitation Responses

- E.3.1. OMES/CP and OEM may at any time hereafter supplement the RFP, the bid and the resulting contract for purposes of enumerating, defining, and clarifying services, duties and functions, but not to add new services,

duties, or functions. Any changes made to the RFP, bid, and resulting contracting will be done by Amendment or Addendum.

- E.3.2. During the evaluation period, Consultants may be requested to present supplemental information clarifying its bid. This supplemental information must be submitted in writing and will be included as a formal part of the Consultant's bid.

E.4. Applicant Overview

- E.4.1. Provide a brief description of the agency's mission and history. Specify which programs the agency currently administers.
- E.4.2. Briefly describe the agency's experience and capability in providing and coordinating long-term DCM services.

E.5. Service Goals and Objectives

- E.5.1. Provide a brief description of the applicant's goals and objectives, and related information concerning the proposed project. Specify:
 - E.5.1.1. The ability to provide the organizational framework for successful program and DCM services that will ensure all grant requirements are met.
 - E.5.1.2. The ability to work within the boundaries of the proposed "Work Plan" provided in this RFP.
 - E.5.1.3. The ability to work through a centralized database that is secured and provides Case Managers with the required information to assist disaster survivors in fulfilling their unmet needs and receive a timely delivery of service without duplication of benefits.
 - E.5.1.4. Briefly describe the ability to produce timely fiscal expenditure reports that adhere to generally accepted accounting principles. Standardized forms that will be provided electronically prior to program start-up.
 - E.5.1.5. Describe the ability to meet the following deadlines listed in C.12

E.6. Program Approach

- E.6.1. Describe the CM program process and workflow process.
- E.6.2. Provide definitions of CM services, case open, case closure, recovery plan, descriptions and definition of recovery plans, and how each of these elements are tracked.
- E.6.3. Describe the ability to gather, analyze and report statistical, programmatic, and fiscal data throughout this process.
- E.6.4. Describe the procedures that will be in place to ensure case management continuity.

E.7. Management Plan

- E.7.1. Provide job description of the proposed manager of the MA. Also describe in detail the number, job titles, qualifications, responsibilities and skills of proposed staff. Please note that a 1:10 supervisor/case manager ratio is a federal grant requirement. This grant provides a maximum of a 1:200 client ratio of Construction Costs Analyst per federal grant requirements. Describe the management, administration and supervision methods that will be utilized in the operation of the program.
- E.7.2. Describe any proposed positions or staffing roles differing from the previously proposed positions.
- E.7.3. Provide a technology plan explaining what kind of technology is normally provided to staff as well as how it is to be used.
- E.7.4. Provide a data management plan explaining how information related to this grant will be stored, accessed, and safeguarded.
- E.7.5. Provide a training plan demonstrating how managing agency and provider level employees will onboard and continuing education throughout the lifecycle of the grant.
- E.7.6. Describe how client cases are tested for consistent CM services.

E.8. Service Coordination/Collaboration

- E.8.1. Describe how the Applicant will work with OEM, DCMP Administrative Controls, OK VOAD, and LTRGs and any other identified resources or service agencies to ensure that DCM services are provided effectively and efficiently.
- E.8.2. Applicants for Managing Agencies should provide letters of intent from local providers.

E.9. Timetable

Based on the parameters set forth in the RFP, describe the timetable for implementation of DCMP.

E.10. Budget

- E.10.1. See Section H.

- E.10.2. Provide details and descriptions regarding any proposed vendor or subcontract agreements (procurement procedures).
- E.10.3. Briefly describe the ability to provide/locate office space for the duration of the program.
- E.10.4. Budget is sufficient to meet the mobilization and case management program delivery while allowing room for contingencies and unexpected needs.
- E.10.5. Describe your budget/cost analysis procedures.
- E.10.6. The budget amount awarded for the life of this grant: \$885,706.53 for the Managing Agency and \$2,362,364.02 for the Provider Level Agencies

E.11. Assurances

- E.11.1. Briefly describe the ability to provide or maintain office space for the duration of the program. The MA and the Provider Level Agency/Agencies may engage other community service providers to locate available office space for the following positions.
- E.11.2. Provide office space for the following positions with the MA:
 - E.11.2.1. **Program Coordinator**
 - E.11.2.2. **Training Coordinator**
 - E.11.2.3. **Resource Coordinator**
 - E.11.2.4. **Data Coordinator**
 - E.11.2.5. **Finance Coordinator**
 - E.11.2.6. **Administrative Specialist**
- E.11.3. Provide office space as deemed necessary in affected counties for the following positions with the Provider Level Agency/Agencies:
 - E.11.3.1. **4 Case Manager Supervisors**
 - E.11.3.2. **30 Case Managers**
 - E.11.3.3. **4 Data Entry Specialists**

E.12. Mandatory Documents

- E.12.1. Provide a copy of Applicant’s organizational chart: current and one (1) for the grant.
- E.12.2. Provide a copy of the most recent organization-wide audit report or financial statement (original proposal only).
- E.12.3. Provide a copy of agency’s Code of Ethics/Conflict of Interest Policy.
- E.12.4. Provide a list of the Board of Directors, Officers and their terms (non-profits only).
- E.12.5. Provide your charitable registration status (non-profits only).
- E.12.6. Provide a copy of Applicant’s Certificate of Incorporation.

F. CHECKLIST

F.1. Listed below is a checklist of items that are to be completed and returned with the proposal. This is not an all-inclusive list and it is the vendor’s responsibility to ensure that they submit all required/requested documentation:

- F.1.1. Required OMES forms.
- F.1.2. Draft invoice.
- F.1.3. Insurance verification.
- F.1.4. Response to the following:
 - F.1.4.1. Applicant Overview
 - F.1.4.2. Service Goals and Objectives
 - F.1.4.3. Program Approach
 - F.1.4.4. Management Plan
 - F.1.4.5. Service Coordination/Collaboration
 - F.1.4.6. Timetable

- F.1.4.7.** Budget
- F.1.4.8.** Assurances
- F.1.4.9.** Vendor Payee form, if applicable. The Vendor Payee form is provided for the responding Supplier that is a new, non-registered payee. OMES Vendor Management requires the information in the attached form before payments can be made to the supplier.
- F.1.4.10.** Mandatory Vendor Registration for Contract Award (In Addition to Section A.15.3)
- F.1.5.** Mandatory documents as listed in E.12
 - F.1.5.1.** ___ Provide a copy of Applicant's organizational chart: current and one for the grant.
 - F.1.5.2.** ___ Provide a copy of the most recent organization-wide audit report or financial statement (original proposal only).
 - F.1.5.3.** ___ Provide a copy of agency's Code of Ethics/Conflict of Interest Policy.
 - F.1.5.4.** ___ Provide a list of the Board of Directors, Officers and their terms (non-profits only).
 - F.1.5.5.** ___ Provide your charitable registration status (non-profits only).
 - F.1.5.6.** ___ Provide a copy of Applicant's Certificate of Incorporation.
- F.1.6.** ___ Value-Added Documents as listed in D.1.9 (Maximum of 20 bonus points)

G. OTHER

G.1. Question Submittal

All questions regarding this solicitation must be submitted in writing and are to be emailed no later than August 30th, 2019, 3:00 P.M. Central Standard Time. Questions are to be emailed to Daniel.Saunders@omes.ok.gov. Questions received after this date will not be answered. If any questions are received, an amendment to this solicitation will be posted on our website after this deadline listing all questions received and their answers. In addition, suppliers will be notified the amendment is on our website. Any communication regarding this RFP must be sent to the Contracting Officer listed above. Failure to do so (contacting the agency directly), may result in your proposal being deemed as non-responsive. Please be sure to reference the RFP number when emailing questions.

G.2. Attachments

- G.2.1.** Budget

H. PRICE AND COST

H.1. Budget Information Summary

Describe your budget/cost analysis procedures.

H.2. Budget

- H.2.1.** Complete the attached budget.
 - H.2.1.1.** Salaries and fringe benefits are the areas covered in the attached budget.



Vendor/Payee Form

Agency: OMES Vendor Management requires the following information for all new non-registered vendors (payees) before payments may be processed. Information is used to establish the payee in the State's PeopleSoft vendor file for payment and procurement activities.

DO NOT use this form for:

- **Garnishment Payees:** Use [OMES Form GarnVendor](#)
- **State Employees:** Use [OMES FORM Employee Vendor Request](#)
- **Vendors pending contract award** to a solicitation released by the division of Central Purchasing or another Oklahoma state agency MUST first register online with the state unless exempt per statute. For additional information, please refer to [Central Purchasing Vendor Registration](#).

AGENCY SECTION (To be completed by state agency representative):

State agency should email completed and signed form to vendor.form@omes.ok.gov or fax to 405-522-3663.

VENDOR/PAYEE SECTION (To be completed by vendor/payee)

Please print legibly or type this information. Form must be completed and signed by authorized individual. Email or fax to requesting state agency.

Agency Name		Contact Name	
Phone #	Fax #	Email	
Agency Request To – Please select all applicable request types			
<input type="checkbox"/> Add New Vendor	<input type="checkbox"/> Update Existing Vendor	PeopleSoft 10-digit Vendor ID	_____
<input type="checkbox"/> Add New Address	<input type="checkbox"/> Change Address/Location	PeopleSoft Address #	_____ PeopleSoft Location # _____
<input type="checkbox"/> Change Vendor Tax ID	<input type="checkbox"/> Change Vendor Name	<input type="checkbox"/> Add Alternate Payee Name	PeopleSoft Location # _____
<input type="checkbox"/> Other	Explain _____		
Vendor 1099 Reportable Status	Attention Paying Agency: Please check the Add box on the left if payments to this vendor/payee are represented by Account Codes listed on page 3 of this form. If the vendor is incorrectly showing as 1099 Reportable, check the Remove box. The PeopleSoft system requires specific details regarding the type of transaction. Please check the box that applies to this vendor:		
<input type="checkbox"/> Add:	<input type="checkbox"/> 1 - Rents	<input type="checkbox"/> 2 - Royalties	<input type="checkbox"/> 3 – Other Income
<input type="checkbox"/> Remove:	<input type="checkbox"/> 6 - Medical & Health Care	<input type="checkbox"/> 7 - Non-Employee Compensation	<input type="checkbox"/> 10 - Crop Insurance Proceeds
	<input type="checkbox"/> 14 - Gross Proceeds to an Attorney		

VENDOR/PAYEE SECTION (To be completed by vendor/payee)

Please print legibly or type this information. Form must be completed and signed by authorized individual. Email or fax to requesting state agency.

Payee Information: Please provide the requested information for the payee receiving funds from the Oklahoma state agency. All information should match U.S. Internal Revenue Service filing records for the business, individual or government entity receiving payment.						
Name		Contact Name				
<i>Payee Legal Name for Business, Individual or Government Entity as filed with IRS</i>		Contact Title				
DBA Name		Phone #				
<i>Doing Business As "DBA", or Disregarded Entity Name if different than Legal Name</i>		Fax #				
Tax Identification Number (TIN) and Type:		<input type="checkbox"/> Federal Employer ID (FEIN) <input type="checkbox"/> Social Security Number (SSN)				
Business Address -- Please provide primary business address as filed with the U.S. Internal Revenue Service						
Address			City			
State	Zip+4	Remittance Email				
Optional Addresses – Please select address type as applicable						
Type:	<input type="checkbox"/> Remitting	<input type="checkbox"/> Ordering	<input type="checkbox"/> Pricing	<input type="checkbox"/> Returning	<input type="checkbox"/> Mailing	<input type="checkbox"/> Other:
Address			City			
State	Zip+4	Remittance Email				
Financial Registration: Please provide contact information for the Authorized Individual who can provide financial information used for ACH Electronic Funds Transfer payment processes. An email will be sent providing instructions for accessing the State of Oklahoma online registration system.						
Name			Title			
				Email		

Account Codes for 1099 Reporting - By Category (TO BE COMPLETED BY AGENCY REPRESENTATIVE)

<input type="checkbox"/> 1 - RENTS 532110 Rent of Office Space 532120 Rent of Land 532130 Rent of Other Building Space 532140 Rent of Equipment and Machinery 532150 Rent of Telecommunications Equip 532160 Rent of Electronic Data Processing Equipment 532170 Rent of Electronic Data Processing Software 532190 Other Rents	<input type="checkbox"/> 1- RENTS (continued) 532141 Rent of Motor Vehicles 532142 Lease of Motor Vehicles <input type="checkbox"/> 2 – ROYALTIES 553170 Royalties	<input type="checkbox"/> 3 – OTHER INCOME 552120 Incentive Awards – Monetary & Material 552160 Incentive Payments – Oklahoma Horse Breeders & Owners 552170 Incentive Payments – Oklahoma Film Enhancement Rebate 553165 Current/Former Employee Reportable Court Ordered or Legal Settlements 553220 Other IRS Reportable Income
<input type="checkbox"/> 6 - MEDICAL & HEALTH CARE PAYMENTS 515530 Veterinary Services 515700 Offices of Physicians (except Mental Health Specialists) 515710 Offices of Physicians, Mental Health Specialists 515720 Offices of Dentists 515730 Offices of Chiropractors 515740 Offices of Optometrists 515750 Offices of Mental Health Practitioners (except Physicians) 515760 Offices of Physical, Occupational & Speech Therapists, & Audiologists 515770 Offices of Podiatrists 515780 Offices of all other Miscellaneous Health Practitioners 515790 Family Planning Centers 515800 Outpatient Mental Health & Substance Abuse Centers 515810 Other Outpatient Care Centers 515820 Medical and Diagnostic Laboratories	515830 Home Health Care Services 515840 Ambulance Services 515850 All other Ambulatory Health Care Services 515860 General Medical & Surgical Hospitals 515870 Psychiatric & Substance Abuse Hospitals 515880 Specialty Hospitals (except Psychiatric & Substance Abuse) 515890 Nursing Care Facilities 515900 Residential Services for People with Developmental Disabilities 515910 Residential Mental Health & Substance Abuse Facilities 515920 Community Care Facilities for the Elderly 515930 Other Residential Care Facilities 537210 Laboratory Services & Supplies 551230 Medical Services to Indigents (from agencies other than DHS) 551240 Hospital Services to Indigents (from agencies other than DHS) 551250 Other Health Services to Indigents (from agencies other than DHS)	
<input type="checkbox"/> 7 - NON-EMPLOYEE COMPENSATION 515010 Office of Lawyers 515020 Offices of Notaries 515030 Other Legal Services 515060 Accounting, Tax Preparation, Bookkeeping & Payroll Services 515210 Payments for Contract Mentor Services 515220 Architectural Services 515230 Landscape Architectural Services 515240 Engineering Services 515250 Drafting Services 515260 Building Inspection Services 515270 Geophysical Surveying & Mapping Services 515280 Surveying and Mapping (except geophysical) Services 515290 Testing Laboratories 515300 Interior Design Services 515310 Industrial Design Services 515320 Graphic Design Services 515330 Other Specialized Design Services 515350 Custom Computer Programming Services 515360 Computer Systems Design Services 515370 Computer Facilities Management Services 515380 Other Computer Related Services 515400 Administrative Management & General Management Consulting Services 515410 Human Resources & Executive Search Consulting Services 515420 Marketing Consulting Services 515430 Process, Physical Distribution, & Logistics Consulting Services 515440 Other Management Consulting Services 515450 Environmental Consulting Services 515460 Other Scientific & Technical Consulting Services 515470 Research & Development in the Physical, Engineering, & Life Sciences 515480 Research & Development in the Social Sciences & Humanities 515490 Advertising and Related Services 515500 Marketing Research & Public Opinion Polling 515510 Photographic Services 515520 Translation & Interpretation Services 515540 All other Professional, Scientific and Technical Services 515550 Management of Companies & Enterprises 515560 Office Administrative Services 515570 Employment Placement Services 515580 Business Support Services 515590 Document Preparation Services	515600 Telephone Call Centers 515610 Business Service Centers 515620 Collection Agencies 515630 Credit Bureaus 515640 Other Business Support Services 515650 Investigation & Security Services 515660 Educational Services 515940 Individual & Family Services 515950 Community Food, Housing & Emergency & Other Relief Services 515960 Vocational Rehabilitation Services 515970 Child Day Care Services 515980 Arts, Entertainment and Recreation 515990 Other Services (except Public Administration) 517110 Moving Expense – Employee Transfer 531150 Printing and Binding Contract 531160 Advertising 531170 Informational Services 531190 Exhibitions, Shows and Special Events 531220 Burial Charges 531330 Jury and Witness Fees 531500 Moving Expenses – General 533100 Maintenance & Repair – Other Items 533110 Maintenance & Repair of Buildings & Grounds (outside vendors) 533120 Maintenance & Repair – Equipment (outside vendors) 533130 Maintenance & Repair of Telephone Equipment (outside vendors) 533140 Maintenance & Repair of Data Processing Equipment (outside vendors) 533150 Maintenance & Repair of Data Processing Software (outside vendors) 533190 Maintenance & Repair – Employee Uniforms 545110 Purchase of Land Improvements 545210 CIP (Construction in Progress) – Land Improvements 546210 Buildings and Other Structures – Construction and Renovation 546220 Major Maintenance and Repair of Equipment 547110 Highway and Bridge Construction Expense – Contractual 547120 Maintenance and Repairs to Highways and Bridges 547210 Major Maintenance and Renovation – Bridges 552100 Stipends – Other 552120 Teacher Stipends (“Incentive” payments) 552130 Oklahoma Police Corps Stipends 553160 Non-Employee Reportable Court Ordered or Legal Settlements 554190 Voter Registration Services 561140 Pollution Remediation	
<input type="checkbox"/> 14 - GROSS PROCEEDS TO AN ATTORNEY 553180 Settlements – Paid To/Thru Attorney		

Sample Managing Agency Estimated Costs

Personnel	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Total
Program Coordinator	1	\$30.00	\$3,600.00	21	\$75,600.00
Financial Coordinator	1	\$25.00	\$3,000.00	21	\$63,000.00
Data Coordinator	1	\$25.00	\$3,000.00	21	\$63,000.00
Resource Coordinator	1	\$25.00	\$3,000.00	21	\$63,000.00
Training Coordinator	1	\$25.00	\$3,000.00	21	\$63,000.00
Project Manager	0	\$25.00	\$0.00	21	\$0.00
Administrative Assistant	1	\$16.00	\$1,920.00	21	\$40,320.00
Subtotal for Personnel Costs at Managing Agency Level					\$367,920.00

Contractor	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Sub-Total
Construction Cost Analyst	3	\$55.00	\$19,800.00	21	\$415,800.00
Subtotal for Contractor Costs at State Level					\$415,800.00

Travel	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Sub-Total
Mileage	3000	\$12.58	\$37,740.00	21	\$36,540.00
National VOAD Conference	2	\$2,500.00	\$5,000.00	2	\$10,000.00
Region 6 Recovery Summit	1	\$1,000.00	\$1,000.00	2	\$2,000.00
OEMA Conference	7	\$400.00	\$2,800.00	2	\$5,600.00
Region 6 Recovery RISC	1	\$850.00	\$850.00	1	\$850.00
Subtotal for Travel Costs at Managing Agency Level					\$54,990.00

Supplies	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Sub-Total
Computer		\$1,200.00	\$8,400.00	1	\$8,400.00
Monitor		\$400.00	\$2,800.00	1	\$2,800.00
Computer Accessories	7	\$650.00	\$4,550.00	1	\$4,550.00
iPhones	7	\$549.00	\$3,843.00	1	\$3,843.00
iPhone Accessories	7	\$150.00	\$1,050.00	1	\$1,050.00
iPhone Service	7	\$44.99	\$314.93	21	\$6,613.53
IT Management	7	\$60.00	\$420.00	21	\$8,820.00
Subtotal for Supplies Costs at Managing Agency Level					\$36,076.53

Training	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Sub-Total
Catering	52	\$10.00	\$520.00	21	\$10,920.00
Subtotal for Training Costs at Managing Agency Level					\$10,920.00

Other	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Sub-Total
Subtotal for Other Costs at Managing Agency Level					\$0.00

Total Program Cost for Managing Agency Level					\$885,706.53
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Sample Provider Level Agency Estimated Costs

Personnel	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Total
Case Management Supervisor	4	\$25.00	\$12,000.00	21	\$252,000.00
Case Manager	30	\$20.00	\$72,000.00	21	\$1,512,000.00
Data Specialist	4	\$20.00	\$9,600.00	21	\$201,600.00
Subtotal for Personnel Costs at Provider Agency Level					\$1,965,600.00

Contractor	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Sub-Total
Subtotal for Contractor Costs at State Level					\$0.00

Travel	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Sub-Total
Mileage	14000	\$0.58	\$8,120.00	21	\$170,520.00
OEMA Conference	38	\$400.00	\$15,200.00	2	\$30,400.00
Subtotal for Travel Costs at Provider Agency Level					\$200,920.00

Supplies	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Sub-Total
Computer	38	\$1,200.00	\$45,600.00	1	\$45,600.00
Monitor	38	\$400.00	\$15,200.00	1	\$15,200.00
Computer Accessories	38	\$650.00	\$24,700.00	1	\$24,700.00
iPhones	38	\$549.00	\$20,862.00	1	\$20,862.00
iPhone Accessories	38	\$150.00	\$5,700.00	1	\$5,700.00
iPhone Service	38	\$44.99	\$1,709.62	21	\$35,902.02
IT Management	38	\$60.00	\$2,280.00	21	\$47,880.00
Subtotal for Supplies Costs at Provider Agency Level					\$195,844.02

Training	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Sub-Total
Subtotal for Training Costs at Provider Agency Level					\$0.00

Other	Unit	Cost Per Unit	Monthly Cost	Duration (Months)	Sub-Total
Subtotal for Other Costs at Provider Agency Level					\$0.00

Total Program Cost for Managing Agency Level					\$2,362,364.02
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Sample Summary Costs

Personnel		Total
Managing Agency		\$367,920.00
Provider Agency		\$1,965,600.00
Total		\$2,333,520.00

Contractor		Total
Managing Agency		\$415,800.00
Provider Agency		\$0.00
Total		\$415,800.00

Travel		Total
Managing Agency		\$54,990.00
Provider Agency		\$200,920.00
Total		\$255,910.00

Supplies		Total
Managing Agency		\$36,076.53
Provider Agency		\$195,844.02
Total		\$231,920.55

Training		Total
Managing Agency		\$10,920.00
Provider Agency		\$0.00
Total		\$10,920.00

Other		Total
Managing Agency		\$0.00
Provider Agency		\$0.00
Total		\$0.00

Grand Total		\$3,248,070.55
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