



Solicitation#: 3400001707

Solicitation Issue Date: 9/04/2020

DUE DATES AND TIME (CENTRAL STANDARD TIME):

Bid Response:

3:00 p.m. on 9/21/2020¹

Request for administrative review:

3:00 p.m. on 9/11/2020

Questions:

3:00 p.m. on 9/14/2020

CONTRACT TYPE:

Agency:

☒

Statewide:

☐

Agency Name/Number: 34000/Oklahoma Department of Health

SOLICITATION TYPE:

☒

Request for Proposal

☐

Request for Quote

☐

Invitation to Bid

Information technology Bidder Instructions are applicable:

☐

Yes

☒

No

Terms regarding sensitive data will be included in the Contract including, but not limited to:

HIPAA _____

CJIS _____

FERPA _____

OTHER x

1075 _____

RETURN SEALED BID TO:

OMESCPeBID@omes.ok.gov

CONTRACTING OFFICER:

Name: Jacob Charries

Email: Jacob.Charries@omes.ok.gov

Phone No. (405) 521-2191

¹ Amendments may change the Bid Response Due Date (read "Amendments" in these Bidder Instructions)

Oklahoma Office of Management and Enterprise Services Bidder Instructions

Information related to the Bid submission process is contained in these Bidder Instructions. **Prospective Bidders are urged to read the documents provided by the State and these Bidder Instructions carefully. Failure to do so shall be at the Bidder's risk.**

1 Definitions

The following terms, when used in these Bidder Instructions, shall have the following meanings:

- 1.1 **Alternate Bid** means a Bid which contains an intentional substantive variation to a basic provision, specification, term or condition.
- 1.2 **Amendment** means a written change, addition, correction or revision to terms, conditions or requirements by the State agency issuing the Solicitation.
- 1.3 **BAFO** means a best and final offer requested by the State agency issuing the Solicitation.
- 1.4 **Bid** means an offer a Bidder submits in response to the Solicitation.
- 1.5 **Bidder** means an individual or business entity that submits a Bid in response to the Solicitation.
- 1.6 **Bid Packet** means the order described in these Bidder Instructions in which all Bidders shall insert the relevant sections of a Bid and which shall be the format for all submitted Bids.
- 1.7 **OAC** means the Oklahoma Administrative Code.

2 Instructions Compliance

These Bidder Instructions are not part of the Contract; however, compliance with these Instructions is material to the determination of whether a Bid is responsive. Terms, requirements and specifications may be stated or phrased differently than in a previous solicitation irrespective of past interpretations, practices or customs. Bid requirements are altered only by written Amendment and verbal communications from any source whatsoever are of no effect. In no event shall the Bidder's failure to read and understand a term, condition or requirement in any of the documents provided by the State constitute grounds for a claim after award of the Contract.

3 Communications and Questions

The Contracting Officer listed on the Bidder Instructions Cover Page is the only individual the Bidder should contact, or communicate with, regarding any questions or issues with the Solicitation or a Bid. Failure to comply with this requirement may result in the Bid being considered non-responsive or not considered for further evaluation.

3.1 General Questions

- A. Questions should be concise, identify the document, include specific section references and avoid use of tables or special formatting (use simple lists).

B. Information Technology Bids

- i If information technology Bidder Instructions are applicable (see Bidder Instructions Cover Page), Bidder may submit general questions concerning Contract or Bid specifications online. Questions received via any other means will not be addressed.
- ii Registration with the State of Oklahoma for wiki access is located at <https://omes.ok.gov/forms/wiki-enrollment-it-procurement>. Access should be requested at least five (5) business days prior to the Questions Due Date. The State is not responsible for a Bidder's lack of access to the wiki.

C. Non-Information Technology Bids

If information technology Bidder Instructions are not applicable (see Bidder Instructions Cover Page), Bidder may submit general questions concerning Contract or Bid specifications at the Contracting Officer's email address shown on the Bidder Instructions Cover Page. Questions received via any other means will not be addressed.

3.2 Clarification Questions

The State reserves the right, at its sole discretion, to request clarifications of Bid information or to conduct discussions for the purpose of clarification with any or all Bidders. The purpose of any such discussion shall be to ensure full understanding of the Bid. If clarifications are made because of such discussion, the Bidder(s) shall put such clarifications in writing. Bidder answers that are outside scope of the clarification questions shall be disregarded. Oral explanations or instructions provided to a potential Bidder is not binding.

4 Administrative Review

- 4.1** A Bidder that believes the Contract or Bid requirements or specifications, or Bid Response Due Date, are unnecessarily restrictive or limit competition may submit a request for administrative review, in writing, to the Contracting Officer. The State shall promptly respond in writing to each written administrative review request, and where appropriate, issue a revision, substitution or clarification through an Amendment. Requests for administrative review of technical or contractual requirements shall include the reason for the request, supported by information, and any proposed changes.
- 4.2** If a Bidder fails to notify the Contracting Officer of an error, ambiguity, conflict, discrepancy, omission or other error in any of the documents provided by the State that is known to Bidder, or that reasonably should be known by Bidder, the Bidder accepts the risk of submitting a Bid and, if

awarded the Contract, shall not be entitled to additional compensation, relief or time by reason of the error or its later correction.

5 Amendments

5.1 Any Amendment shall be set forth at the same online link as the Solicitation.

5.2 It is the Bidder's responsibility to check the State's website frequently for any possible Amendments that may be issued. The State is not responsible for the Bidder's failure to download any amendment documents required to complete a Bid.

6 Confidentiality Request

Unless otherwise specified in the Oklahoma Open Records Act, Central Purchasing Act, or other applicable law, 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 pursuant to OAC 260:115-3-9². However, a public Bid opening does not make the Bid immediately accessible to the public. All material submitted by a Bidder becomes the property of the State. No portion of a Bid shall be considered confidential after award of the Contract except, pursuant to 74 O.S. §85.10, information in the Bid determined to be confidential by the State Purchasing Director or delegate. Typically, a properly submitted confidentiality claim of a potential awardee is reviewed and determined prior to award; a properly submitted confidentiality claim of a non-awarded Bidder is reviewed and determined only when responding to an open records request concerning the Bid. Additional information regarding information considered confidential by a Bidder is provided in Section 8.2.C below.

7 Acceptance of Content

Unless otherwise provided in Section Four of a Bidder's response, all Bids shall be firm representations that the responding Bidder has carefully investigated and will comply with all State terms and conditions relating to the Contract. Upon award of a contract to the successful Bidder, such terms and conditions, as may be amended by the Bid after negotiation, shall become contractual obligations between the parties.

8 Required Bid Structure

8.1 Preparation of Bid

A. The Bid is required to be structured into separate, labelled and easily identifiable sections using the Bid Packet format provided below. A Bid submitted using any other format may not be accepted. The Bid should not contain duplicative content. Any section of the Bid Packet that is not applicable to the Bid shall have a page inserted to denote the section is not applicable. For instance, if business references are not required, the Bid should contain a page after the "Business References" section heading that reads "Not Applicable", "N/A" or some similar notation.

B. The Bid will be evaluated using a best value criteria, based on the following:

- i** Specifications and Requirements
- ii** Price

² OAC 260:115-3-9 is located at

http://www.oar.state.ok.us/oar/codedoc02.nsf/frmMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcbq8dtmmak31ctijurgcln50ob7ckj42tbkdt374obdcli00

- C. As referenced in subsection 8.2.H, the Bid shall show the ability of the Bidder to meet or exceed the following mandatory specifications and Requirements:

This contract is entered into between the Oklahoma State Department of Health, Maternal and Child Health Services, hereinafter referred to as OSDH, by virtue of the authority vested in it by 74 O.S. § 85.1, et. al. and the successful bidder.

All terms and conditions herein become the contract between the OSDH and the Contractor. The Contractor agrees to comply with all of these terms and conditions. Contractor understands and agrees that when any term and/or condition contained within this contract is, or becomes, applicable to the Contractor's officers and/or employees, Contractor agrees to ensure that its officers and employees (collectively, "organization") abide by the terms and/or condition applicable to organization.

This Solicitation is a Contract Document and is a request for proposal in connection with the Contract awarded by the Office of Management and Enterprise Services as more particularly described below. Any defined term used herein but not defined herein shall have the meaning ascribed in the General Terms or other Contract Document.

Mandatory Specifications and Requirements:

C.1 Prepare a Narrative response which includes Project Description (Organizational Capacity, Description of Services, and Needs Assessment), which should not exceed 30 single spaced pages with 1" margins. Font size should be no smaller than 12 point.

C.2 Prepare a Statement of Work/Work Plan (see Exhibit titled Project Work Plan) to serve youth and parents who reside in communities where rates are the highest in adolescent teen birth, youth in foster care, and/or youth most likely to engage in risky behavior.

1. Projects providing, in-class instruction, an after school program, and/or a summer program, should use one of the following Evidence Based Curricula:
 - Be Proud! Be Responsible!
 - Heritage Keepers
 - Promoting Health Among Teens! (Abstinence only intervention)
2. If a project wishes to change curricula during the contract year, this must be approved by the Program Grant Coordinator. All education materials that are presented as factual will be grounded in scientific research and will be reviewed for medical accuracy.
3. Projects must address at least one of the following federal legislative priorities for sexual risk avoidance education;
 - a. The holistic individual and societal benefits associated with personal responsibility, self-regulation, goal setting, healthy decision making, and a focus on the future;
 - b. The advantage of refraining from non-marital sexual activity in order to improve the future prospects, and physical and emotional health of youth;
 - c. The increased likelihood of avoiding poverty when youth attain self-sufficiency and emotional maturity before engaging in sexual activity;

- d. The foundational components of healthy relationships and their impact on the formation of healthy marriages and safe and stable families;
- e. How other youth risk behaviors, such as drug and alcohol usage, increase the risk for teen sex;
- f. How to risk and avoid, and receive help regarding sexual coercion and dating violence, recognizing that even with consent teen sex remains a youth risk behavior;

C.3 Project Description: Organizational Capacity

- 1. Describe the organization, philosophy, mission, capacity, and services rendered.
- 2. Describe previous and current accomplishments of serving at-risk youth populations.
- 3. Describe the experience of the organization's leadership and their role in the day-to-day operations of the organization.
- 4. Provide an organizational chart demonstrating lines of supervision and authority as an attachment to the RFP response.
- 5. Describe the experience of the person(s) who will be responsible for the day-to-day management of this project.
- 6. Provide job descriptions, resumes, and copies of credentials/licensure for key staff members as an attachment to the RFP response.
- 7. Describe the extent to which staff are representative of the population served.
- 8. Describe any contractual agreements the organization currently has in place with health care providers or other health agencies/entities.
- 9. Describe your existing or proposed quality improvement (QI) activities.
- 10. Provide a copy of your 501(c)3 non-profit documentation, if applicable.
- 11. Provide a signed and notarized Financial Capability Affidavit. (See Appendix D.)

C.4 Description of Services:

- 1. Describe in detail any mentoring, counseling, and/or adult supervision services, sexual risk avoidance education services or teen pregnancy prevention services your organization currently provides (including funding source and duration of funding).
- 2. Describe in detail how these OSDH funds will be used to expand or enhance these existing services. Note: Bidder awarded must not use these funds to supplant Federal, State, and/or local funds being used for existing services.
- 3. Address how services will be available, accessible, and coordinated. Describe how your organization will assure high quality of these services. Descriptions should contain specific service information, descriptions of how input on improving services will be obtained from youth and families, and steps that will be initiated to facilitate use of this input to improve services.
- 4. Include a description of the primary geographic service areas and site location(s) to be served. Include in the description how services will be coordinated with other agencies.
- 5. Identify the projected number of youth that will be served and how this number was reached.

6. Describe how cultural and linguistic competent service delivery will be ensured including interpreter services.
7. Describe your ability to access your target population.

C.5 Needs Assessment:

1. Provide information describing specific problems and needs of the population to be served. Include what factors, such as age, gender, geography, socioeconomic, or cultural issues contribute to the need for intervention that promotes positive behaviors and the avoidance of risky behaviors for this population. Support this with citations to the specific resources used to gather this information.
2. Define the community and population to be served including primary service area and demographic characteristics (i.e., age, gender, race/ethnicity, economic base, education, percentage below poverty, crime rate, incidence of alcohol and drug use, and rates of STDs, etc.).
3. Describe the current problems within the community that impact out-of-wedlock pregnancy in the identified population.
4. Identify the existing sexual risk avoidance education efforts in the community.
5. Describe the barriers to and gaps in these services.

C.6 Work Plan:

1. Complete Exhibit titled Budget Form identifying goals and objectives for each year of the contract period. All objectives must be SMART: specific, measurable, attainable, realistic, and time framed;
2. Identify activities that will be accomplished to assure that the objectives are met. List all staff positions by percentage of time dedicated to providing services. Identify positions by title only. Do not identify by name or other personal information.
3. Complete a sustainability plan utilizing the attached documents and in collaboration with this contracts representative, Mekay Bixby.

C.7 Minimum Mandatory Requirements

1. Be a 501(C)3 private non-profit, faith-based, government agency or public organization.
2. Provide services in counties that have either high adolescent teen birth rates or high number of teen births, as defined in Purpose 2.
3. Must be able to demonstrate that they have the capability to implement and monitor the proposed program and must demonstrate financial capability.
4. Include in their RFP Package a signed and notarized Financial Capability Affidavit (Exhibit titled Financial Capability) affirming that they meet the financial capability requirements as outlined.

C.7.1 Mom Mandatory Requirements

1. Projects may focus on communities/counties where adolescent teen birth rates are higher than 20.3 per 1,000 girls ages 15-19 years; or projects may

focus on a specific youth population, such as youth in foster care, youth of incarcerated parents, youth without adequate supervision, or youth that are likely to engage in risky behaviors.

C.8 Contract Expense Cap

1. The OSDH has a proposed budget of \$400,000 to reimburse a maximum of five (5) sexual risk avoidance education programs. Bidders may submit proposals for more than one project. Awarded amount may not be the same as the bidder's proposed project amount. For purposes of this project the initial budget period runs for the Federal Fiscal Year 2020, October 1, 2020 through September 30, 2021.
2. Payment shall be made in accordance with the approved line item budget (Exhibit titled Budget Form). Total award amount from the OSDH to fund this contract is contingent upon receipt of federal funds.
3. Renewal amounts are expected to be the same amount as the final contract award for the first contract period (10/01/2020 – 9/30/2021). Final approval of the renewal amounts will be at the sole discretion of the OSDH. Additional funding for renewal periods shall not exceed the original contract amount by 30%, and will depend on the availability of funds and project progress.

C.9 Federal Award Information

This agreement is fully or partially funded through federal funds. An updated notice of federal award information will be provided with each contract renewal, contract modification, or other change that affects the amount of the contract or the allocation of fund source(s). The amount below identifies the amount of each applicable federal award for this contract, and may not be the same as the total amount of the federal award provided to OSDH or as the total amount of this contract.

- a. FAIN #: 2001OKSRAE
- b. Award Name: Sexual Risk Avoidance Education
- c. Award Year: October 1, 2019 through September 30, 2021
- d. CFDA #: 93.235
- e. Federal Awarding Agency: Department of Health & Human Services-Admin. For Children and Families.
- f. Amount: \$400,000.00

- D.** As referenced in subsection 8.2.H, service level agreements and proposed first draft of Statement of Work/Work Plan, are required to be included in the Bid.

E. Pricing

The OSDH has a proposed budget of \$400,000 to reimburse a maximum of five (5) projects. Suppliers may submit proposals for more than one project. Awarded amount may not be the same as the bidder's proposed project amount. For purposes of this project the *initial budget period runs for the federal fiscal year; October 1, 2020 through September 30, 2021*. Total award amount from the OSDH to fund this contract is contingent upon receipt of federal funds.

E.1 Proposed Budget and Budget Justification

A line item budget and budget justification must be submitted with the RFP response. Failure to submit these documents will cause the Supplier's response to be deemed non-responsive and not evaluated for an award. Please use the provided budget forms. (Exhibit titled Budget Form)

The line item budget and budget justification submitted with the RFP response are **proposed** budgets and adjustments/corrections or additional documentation supporting the budget may be required after award.

Keep the following in mind while preparing the project budget:

1. Reimbursement is made in accordance with the approved line item budget and only after the Supplier has received and paid for the goods or services. The requested budget amount may not be the awarded amount.
2. The OSDH will review the Supplier's expenditures throughout the term of the contract and may require a reduction in the contract amount if expenditure patterns demonstrate a funding lapse.
3. It is the Supplier's responsibility to monitor the individual line items from month to month in order to prevent overspending in a line item during the contract period.
4. Budget revisions require prior OSDH written approval and are limited to one per quarter. Final budget revision of the year is due August 1st, 60 days before the end of the contract year.

E.2. The following information is being provided for preparation of the proposed budget:

1. Budget Justification

The budget justification is a separate document written in a narrative format that details what is proposed for reimbursement for the contract period. The budget form requires the Supplier to provide sufficient detail in each category to justify how funds support programmatic and administrative activities to accomplish the requirements of the RFP.

2. Personnel/Salaries

Actual salaries and wages paid to Supplier's personnel working on a specific OSDH program. If an individual who is not an employee of the Supplier provides a service, then this service has been contracted out to a subcontractor and should be listed in the subcontractor line item on the budget.

3. Fringe Benefits

Actual fringe benefits paid to the Supplier's personnel working on a specific OSDH program. For budget purposes, a percentage rate for fringe benefits may be used. However, for audit purposes, the Suppliers' financial records must clearly define each actual fringe benefit cost as a separate expense and is applicable only to the approved budgeted salaries. Fringe benefits (e.g., retirement program, FICA, insurance, workman's compensation, etc.) are usually applicable to direct salaries and wages. If fringe benefits are to be provided, then a clear description must be included of how the computation of fringe benefits was determined.

4. Travel/Training

If travel costs and related expenses are a part of the contract, the Supplier's request for reimbursement shall not exceed those authorized by the Federal Conus Rates published at the GSA Website located at <http://www.gsa.gov/portal/category/100000>. Those requirements are stated in the State of Oklahoma's State Travel Reimbursement Act, Title 74 O.S. 2001 § 500.1, et seq. All out-of-state travel where reimbursement is requested must be pre-approved in writing by the OSDH. In addition, OSDH allowable travel costs must

be directly related to the activities of the contract and therefore may require allocation of those costs to all programs benefitted based on an equitable allocation methodology.

Travel/Training expenditures may include:

- mileage to and from consultation meetings with referral agencies;
- mileage to and from public awareness/public education sessions;
- per diem for attending in-state training meetings or conferences; and/or
- overnight lodging expenses for attending in –state training meetings or
- conferences (including direct payments to hotels/motels/conferences.)
- attendance at program approved designated training(s) required to fulfill the requirements of the program (written approval must be received from the OSDH before attendance)

5. Supplies

Supplies are materials necessary to conduct the program.

Supplies may include:

- materials used to promote the programs in the community such as pamphlets and brochures;
- educational materials such as video tapes, pamphlets, brochures, books, curricula;
- office supplies such as paper, pens, pencils, file folders

6. Contractual

Contractual expenditures include essential consultation, program services that cannot be provided by the Supplier. Subcontracts and other contractual agreements must be clearly defined in the proposed budget. A Professional Service Evaluation must be submitted for each sub-contractor at the end of their contract. Contractual expenditures may include:

- subcontract with other agencies to provide specific program-related services;
- subcontracts with program consultants;
- subcontracts with trainers

7. Administrative Costs

The following is a partial list of allowable and unallowable expenses included in this RFP for budget development purposes only. These lists are only a guide and are not inclusive of all allowable and unallowable expenses. Refer to the appropriate OMB Circular for an inclusive list of allowable and unallowable expenses.

8. Allocated Costs:

Allocated Costs are expenses that are not 100% directly related to a particular funding source/program. Suppliers may bill for these costs using a cost allocation plan.

9. Allowable and Unallowable Line Items/Expenses

May be found in SuperCircular 2 CFR Part 200.

E.3 Pricing shall be proposed as follows:

1. A line item budget and budget justification must be submitted with the RFP response. Failure to submit these documents will cause the Supplier's response to be deemed non-responsive and not evaluated for an award. Please use the provided budget forms. (See Exhibit titled Budget Form)
2. The line item budget and budget justification submitted with the RFP response are proposed. All budgets are effective only upon approval of the OSDH contract monitor. Adjustments or additional documentation may be required prior to award;
3. Line Item Budget Preparation – The submitted proposed budget must cover the period October 1, 2020 through September 30, 2021 and figures must be rounded to the next whole dollar amount;
4. Complete a separate budget form for each year of the contract period. Refer to the Office of Management and Budget (OMB) Circular appropriate to the organization submitting a response to this RFP, i.e. OMB Circular A-122 Cost Principals for Non-Profit Organizations. OMB Circulars can be found at www.whitehouse.gov/OMB;
5. Budgets reflect allowable expenditures. Allowable expenditures must reflect the costs of providing the services detailed in this RFP. Once the final budget amount is approved, the total amount cannot be changed from the original award without justification from the Supplier and approval by OMES; and
6. Value-added items may be included in J. Section Ten of 8.2.

F. The following additional company information is required to be included in the Bid:

- i Length of time the Bidder has been in business;
- ii A brief description of the company;
- iii Company size and organization;
- iv The number of years the Bidder has been providing the service requested;
- v The core competency of the company;
- vi Number of clients;
- vii Average client size (i.e., employee count); and

G. If a third-party vendor is included as part of a submitted Bid, the following information is required to be included in the Bid for each such third-party vendor:

- i Company history;
- ii Relationship to Bidder;
- iii Clients for which the two entities have worked together; and
- iv Products and/or services proposed to be provided by the third-party vendor and how those products and/or services interface with the Bidder's solution.

8.2 Bid Packet Format

A. Section One: Cover Page

A dated cover page or transmittal letter that identifies the Solicitation and the Bidder and provides Bidder contact information.

B. Section Two: Required Forms, Certifications and Disclosures

- i Completed "Responding Bidder Information" form set forth and accompanying required documentation.

- ii Completed “Certification for Competitive Bid and Contract” form.
- iii Bidder shall additionally provide in this section of its Bid, disclosure of (1) any public contract terminated by a governmental entity or suits or claims against the Bidder for failure to perform in connection with a public contract (including any company which a Bidder has merged with or acquired that will be performing services or providing products if awarded the Contract); (2) any contractual relationship or any other relevant contact with any State personnel or another Bidder or Supplier involved in the development of a Bidder’s response to the Solicitation; (3) the name of any officer, director or agent of the Bidder who is also an employee of the State of Oklahoma or any of its agencies; (4) the name of any state employee who owns, directly or indirectly, an interest of five percent (5%) or more in the Bidder firm or any of its branches and (5) any activity or interest that conflicts or may conflict with the best interest of the State, including but not limited to any person or entity currently under contract with or seeking to do business with the State, its employees or any other third-party individual or entity awarded a contract with the State. Any conflict of interest shall, at the sole discretion of the State, be grounds for rejection of the Bid or partial or whole termination of the Contract.
- iv Certificate of Insurance and Workers’ Compensation form.
- v Completed Vendor Payee form.
- vi Any information requested in connection with a Solicitation regarding subcontractors a Bidder proposes to use in performance of the resulting contract.
- vii Signed Amendment(s), if any, located at the same online link as the Solicitation.

The Bidder shall acknowledge agreement with each Amendment, if any, by inserting the Amendment in this section, signed by or on behalf of the Bidder.

C. Section Three: Bid Portions Requested to be Held Confidential

- i If the Bid Packet contains information the Bidder believes to be confidential, the Bid Packet shall be conspicuously marked on the outside to indicate it contains information considered confidential.
- ii Any portion of the Bid that the Bidder requests be held confidential shall be inserted in this section and the Bidder must specifically identify, on each page, the specific information considered confidential and otherwise fully comply with OAC 260:115-3-9³ which additionally requires a Bidder to enumerate the specific grounds, based on applicable laws which support treatment of the information as exempt from disclosure and explain why disclosure is not in the best interest of the

³ OAC 260:115-3-9 is located at

http://www.oar.state.ok.us/oar/codedoc02.nsf/frmMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcbq8dtmmak31ctijurgcln50ob7ckj42tbkdt374obdcli00

public. Additional information regarding information considered confidential by a Bidder is provided in Section 6 above.

- iii A Bid marked in total, as proprietary and/or confidential shall not be considered confidential. Likewise, unless specifically referenced otherwise, resumes, pricing, marketing materials, business references, Voluntary Product Accessibility Templates, additional terms proposed by a Bidder and subcontractor information are not confidential and are not exempt from disclosure under the Oklahoma Open Records Act. The foregoing list is intended to address information often marked confidential that is not exempt from disclosure and is not an exhaustive list.
- iv **ANY INFORMATION MARKED AS CONFIDENTIAL AND EMBODIED ELSEWHERE IN A BID RATHER THAN INSERTED IN THIS SECTION OF THE BID PACKET WILL NOT BE CONSIDERED CONFIDENTIAL AND WILL BE SUBJECT TO DISCLOSURE WITHOUT FURTHER REVIEW. THE STATE HAS NO RESPONSIBILITY TO INDEPENDENTLY REVIEW AN ENTIRE BID FOR A CONFIDENTIALITY CLAIM. LIKEWISE, CONFIDENTIALITY CLAIMS OF A BIDDER WILL NOT BE CONSIDERED IF A BID DOES NOT COMPLY WITH REQUIREMENTS OF OAC 260:115-3-9 AND THE INFORMATION WILL BE SUBJECT TO DISCLOSURE PURSUANT TO STATE LAW.**

D. Section Four: Requested Exceptions to Terms

- i Any requested exception or revision to terms or conditions provided by the State shall be inserted in this section using the table provided at the end of these Bidder Instructions. If no exceptions or revisions are requested, the Bid should reflect that by either submitting the table with no additions to it or by marking the table "N/A". Each requested exception or revision shall identify (i) the document and section reference of the specific affected term and (ii) either that the term is inapplicable and should be intentionally omitted or offer alternative language if the Bidder is requesting revision of the term. Some examples are provided on the table for illustrative purposes only and, if not deleted in a submitted Bid, will be disregarded.
- ii A clarification question is not an exception and any clarification included in this section will be disregarded.
- iii If the Bid contains a copy of existing terms between the Bidder and the State that the Bidder believes are applicable to the Acquisition, the Bidder need not take exceptions to the General Terms; however, the remainder of terms and contents of a document provided by the State including, without limitation, all attachments, appendices and exhibits remain applicable and are not supplanted by such existing terms. Therefore, any exception to portions of the Solicitation or other related

documents, other than General Terms must be included in this section as an exception.

- iv **THE STATE HAS NO RESPONSIBILITY TO INDEPENDENTLY REVIEW AN ENTIRE BID FOR EXCEPTIONS AND ANY EXCEPTION EMBODIED IN ANOTHER SECTION OF THE BID OR IN A FORMAT OTHER THAN THE PROVIDED TABLE WILL NOT BE CONSIDERED. LIKEWISE, AN EXCEPTION EXPRESSING ONLY GENERAL DISAGREEMENT WITH A TERM OR A GENERAL EXCEPTION TO ANY STATE TERMS OR CONDITIONS, WITHOUT SUGGESTED ALTERNATIVE WORDING OR IDENTIFYING THAT THE TERM SHOULD BE INTENTIONALLY OMITTED, WILL NOT BE CONSIDERED.**

E. Section Five: Additional Bidder Terms

Any additional terms that the Bidder requests be applicable to the Contract shall be inserted in this section and shall be provided in Word format. **THE STATE HAS NO RESPONSIBILITY TO INDEPENDENTLY REVIEW AN ENTIRE BID FOR ADDITIONAL TERMS AND ANY SUCH TERMS NOT SUBMITTED IN THIS SECTION OF THE BID SHALL NOT BE CONSIDERED.** Should a Bidder be awarded a Contract, neither the State nor a customer shall be required to execute additional documents not included in a Bid. For example, if a Bidder typically uses an ordering document in connection with an acquisition, the ordering document template shall be included in the Bid.

F. Section Six: Existing Terms between Bidder and State

A copy of any existing terms, mutually executed by the Bidder and the State, that the Bidder believes are applicable to the Acquisition shall be inserted in this section. Any existing terms not submitted in this section of the Bid shall not be considered.

G. Section Seven: Executive Summary

The Bidder's executive summary shall be inserted in this section. Marketing information, general company information and other similar information should be included in the executive summary and should not be included in other sections of the Bid.

H. Section Eight: Response to Specifications and Requirements

- i The portion of the Bid to be inserted in this section shows the ability of the Bidder to meet or exceed any Contract and Bid specifications and requirements.
- ii If a VPAT is required, the URL link to the Bidder's VPAT shall be inserted in this section at the Bid Packet page referencing the VPAT.
- iii If an information technology Security Certification and Accreditation Assessment is required, the completed Assessment shall be inserted in this section at a Bid Packet page referencing the Security Accreditation Assessment.

The Assessment is located online
at https://omes.ok.gov/sites/g/files/gmc316/f/SecurityCertification-R_0.xlsx.

- iv If service level agreements are required, the proposed service level agreements shall be inserted in this section at a Bid Packet page referencing the proposed Service Level Agreements.
- v If a Statement of Work is required, the proposed draft shall be inserted in this section at a Bid Packet page referencing the proposed Statement of Work.

I. Section Nine: Pricing

Pricing associated with the Bid shall be inserted in this section and shall be in the required structure set forth above in Section 8.1, if any.

J. Section Ten: Offer of Value-Added Products and/or Services

If a Bid includes an offer of value-added products and/or services, such offer shall be inserted in this section and include associated pricing and any other information relevant to such value-added offer. However, the State is not obligated to purchase value-added products or services.

K. Section Eleven: Financial Information

Any required financial and associated information shall be inserted in this section.

L. Section Twelve: Business References

Any required business references and associated information shall be inserted in this section.

M. Section Thirteen: Additional Company Information

Any additional required company information shall be inserted in this section.

9 Submission of Bid

9.1 IT IS THE BIDDER'S SOLE RESPONSIBILITY TO SUBMIT INFORMATION IN THE BID AS REQUESTED AND IN COMPLIANCE WITH THE OKLAHOMA CENTRAL PURCHASING ACT AND ASSOCIATED OAC TITLE 260 RULES⁴ INCLUDING WITHOUT LIMITATION OAC 260:115-3-7 AND 260:115-3-11⁵. A submitted Bid is rendered as a legal offer and is required to be in strict conformity with these Bidder Instructions.

9.2 Due to the COVID 19 outbreak, a Bid shall be submitted via email to OMESCPeBID@omes.ok.gov. In person, commercial carrier or facsimile submittals shall not be accepted. The email Bid shall contain the Solicitation Number, Bid Response Due Date and Time in the subject line of the email. The State is not responsible for incorrect link information or inability to access a submitted Bid.

⁴ Oklahoma Administrative Code Title 260, Chapter 115 is located at
http://www.oar.state.ok.us/oar/codedoc02.nsf/frmMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcqb8dtmmak31ctijujrgcln50ob7ckj42tbkdt374obdcli00

⁵ OAC 260:115-3-7 and OAC 260:115-3-11 are located at
http://www.oar.state.ok.us/oar/codedoc02.nsf/frmMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcqb8dtmmak31ctijujrgcln50ob7ckj42tbkdt374obdcli00

- 9.3** Due to the COVID 19 outbreak, this subsection is intentionally omitted.
- 9.4** Due to the COVID 19 outbreak, this subsection is intentionally omitted.
- 9.5** Unless otherwise specified, (i) manufacturers' names, brand names, information, and/or catalog numbers listed in a specification are for informational purposes and not intended to limit competition and (ii) a Bidder may offer any brand for which it is an authorized representative, which meets or exceeds the specification for any item(s). Bidder shall offer new items of current design and technology unless a document provided by the State in connection with the Solicitation specifies older models or versions, or used, reconditioned, or remanufactured products are acceptable. Warranties in either case should be the same. However, if a Bid is based on equivalent products, the Bid is required to state the manufacturer's name and number. The Bid shall also explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. Reference to literature submitted with a previous Bid shall not satisfy a specification or requirement associated with the present Bid. Any previous solicitation or resultant contract shall not be depended upon, perceived or interpreted to have any relevance to the present Bid.
- 9.6** Bids shall remain a firm offer for a minimum of one hundred twenty (120) days after the Bid Response Due Date. Any usage amounts provided by the State are estimates and are not guaranteed to be purchased.
- 9.7** Unless specified otherwise, a Bidder shall submit a firm, fixed price for the term, including optional renewal terms, of the Contract. The Bidder guarantees unit prices to be correct.
- 9.8** In accordance with 74 O.S. §85.40, all travel expenses to be incurred by Supplier in performance of the Contract shall be included in the total Bid price/contract amount. Travel expenses include, but are not limited to, transportation, lodging and meals. Examples of other miscellaneous travel expenses are referenced in §10.14 of the Statewide Accounting Manual⁶.
- 9.9** A Bid containing early payment discounts may be evaluated when making an award. If a Bidder wishes to offer an early payment discount, the Bid must include available discount percentages for no less than ten (10) days payment, increasing in five (5) day increments up to thirty (30) days. The discount percentages shall be expressed in a half or whole percentage, with the minimum discount percentage being 0.5%. The State is not obligated to utilize an offered discount.
- 9.10** All costs incurred by the Bidder for Bid preparation and participation shall be the sole responsibility of the Bidder and the Bidder shall not be reimbursed for any such costs. By submitting a Bid,

⁶ Statewide Accounting Manual is located at <https://omes.ok.gov/sites/g/files/gmc316/f/StatewideAccountingManual.pdf>.

Bidder agrees not to make any claims for damages or have any rights to damages in connection with the Bid.

- 9.11 For consistency of contract structure, certain State terms may be marked “Intentionally Omitted”. If so, no response is expected.
- 9.12 After review of a Bidder's submitted documents and information, the State may require additional terms in which customer data will be accessed, processed or stored by a Supplier.
- 9.13 Each Bid is required to include relevant information for a designated contact to receive notice, approvals and requests allowed or required by the terms of the Contract.

10 Bid Withdrawal, Bid Change and Alternate Bid

- 10.1 Except as authorized by the State Purchasing Director after proof by the Bidder that a significant error by the Bidder exists in the Bid, a Bid may not be withdrawn after the Bid Response Due Date and Time. If the Bidder wishes to withdraw a Bid prior to the Bid Response Due Date and Time, the Bidder shall submit a written withdrawal request to the State Purchasing Director in accordance with OAC 260:115-3-13⁷ except that the request shall be emailed to the email address listed in Section 9 above, due to the COVID 19 outbreak.
- 10.2 Except as requested by the State, a Bid may not be changed after the Bid Response Due Date and Time. If the Bidder needs to change a submitted Bid prior to the Bid Response Due Date and Time, the Bidder shall withdraw the originally submitted Bid and a new Bid shall be submitted to the State by the Bid Response Due Date and Time in accordance with Section 9 and include the following statement on the superseding Bid cover page: **“THIS BID SUPERSEDES THE BID PREVIOUSLY SUBMITTED” AND “SUPERSEDING BID” MUST APPEAR IN THE SUBJECT LINE OF THE EMAIL.**
- 10.3 A Bidder may submit one or more Alternate Bids. Any Alternate Bid submitted shall be a complete Bid and shall be clearly identified as an Alternate Bid in the subject line of the email. If more than one Alternate Bid is submitted, the identification in the email subject line shall refer to Alternate Bid 1, Alternate Bid 2, etc.

11 Bid Rejection

- 11.1 The Bidder’s failure to submit required information may cause its Bid to be rejected. Additionally, a Bid received after the Bid Response Due Date and Time **SHALL BE DEEMED NON-RESPONSIVE AND SHALL NOT BE CONSIDERED unless the State Purchasing Director has authorized acceptance of Bids due to a significant error or incident that occurred which affected the receipt of a Bid.**⁸ Failure to comply with these Bidder Instructions may result in the

⁷ OAC 260:115-3-13 is located at

http://www.oar.state.ok.us/oar/codedoc02.nsf/frnMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcqbq8dtmmak3lctijurgcln50ob7ckj42tbkdt374obdcli00.

⁸ OAC 260:115-3-11

Bid being disqualified from evaluation. Unless opened for identification, Bids received late will be returned unopened in a timely manner.

- 11.2 A Bid may be rejected when the Bidder imposes terms or conditions that would modify requirements or limit the Bidder's liability to the State. Other possible reasons for rejection of Bids are listed in OAC 260:115-3-5 and 260:115-7-32(h)⁹.
- 11.3 Attempts to impose unacceptable conditions on the State or impose alternative terms not in the best interest of the State shall not be tolerated. Continued attempts to impose unacceptable conditions or terms on the State shall result in a determination of non-responsiveness of the Bid.
- 11.4 Whenever the terms "shall", "must", "will", or "is required" are used, the specification being referred to is a mandatory specification. Failure to meet any mandatory specification may cause rejection of a Bid.
- 11.5 Whenever the terms "can", "may", or "should" are used, the specification being referred to is a desirable item and failure to provide any item so termed shall not be cause for rejection of a Bid.

12 Bid Public Opening

Due to the COVID 19 outbreak, there will be no physical Bid openings at this time. Public Bid openings will be conducted on a per request basis via Zoom provided the Contracting Officer receives a written request no later than forty-eight (48) hours prior to the Bid Response Due Date and Time. Zoom information will be provided to anyone requesting a public Bid Opening.

13 Evaluation

- 13.1 A responsive Bid will proceed to the evaluation process. Unless specified that "best value" criteria will be used to determine award, Bids shall be evaluated on "lowest and best" criteria.
- 13.2 Pursuant to OAC 260:115-7-32, Bidder past performance as a Supplier may be considered when evaluating a Bid.
- 13.3 Pursuant to 74 O.S. §85.44E, a Bid submitted by a service-disabled veteran business that does business in Oklahoma or maintains an Oklahoma office or place of business will be given a three-percentage point bonus preference in scoring the Bid.
- 13.4 The State reserves the right to require demonstrations, clarifications and additional documentation from any or all responding Bidders. Each Bidder should be prepared to participate in oral presentations and demonstrations to define the Bid, to introduce the Bidder's team and to respond to questions regarding the Bid if required by the State prior to award.

14 Competitive Negotiations of Offers

- 14.1 The State reserves the right to negotiate with none or one or more Bidders responding to the Solicitation and may negotiate any or all content of the Bid to obtain the best value for the State.

⁹ OAC 260:115-3-5 and 260:115-7-32 is located at:

http://www.oar.state.ok.us/oar/codedoc02.nsf/frnMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcqb8dtmmak3lctijujrgcln50ob7ckj42tbkdt374obdcli00

Negotiations may be conducted in person, in writing or by electronic means and shall only be conducted with potentially acceptable Bids.

- 14.2 Negotiations could entail discussions on products, services, pricing, contract terminology or any other issue material to an award decision or that may mitigate the State's risks. The State shall consider all issues arising from the Bid to be negotiable and will not be artificially constrained by internal corporate policies. In the event of prolonged contract negotiations due to the number and/or significance of exceptions taken, lack of Bidder responsiveness or other failure to close contract negotiations that are not caused by the State, the State may, in its discretion, offer a successful Bidder a shorter contract term.
- 14.3 Firms that contend a lack of flexibility because of corporate policy on a particular negotiation item shall face a significant disadvantage and may not be considered.
- 14.4 Terms, conditions, prices, methodology, or other features of the Bid 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 Bid.
- 14.5 Requirements and any terms marked as non-negotiable after the section title shall not be negotiable and shall remain unchanged unless the State determines that a change in such requirements or terms is in the best interest of the State.
- 14.6 The State may request a BAFO and shall determine the scope and subject of any BAFO request. However, the Bidder should not expect an opportunity to otherwise strengthen its Bid and should submit its best Bid based on requirements herein. Any information offered outside the scope of the BAFO request will not be considered and will be disregarded.

15 Award of Contract

- 15.1 The State 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 to be in the best interest of the State.
- 15.2 In order to receive an award or payments from the State, a Bidder must be registered **as both a Bidder and as a Supplier** and must maintain the registration prior to any Contract renewal term. The registration process may be completed electronically at the following link: <https://omes.ok.gov/services/purchasing/vendor-registration>.
- 15.3 Pursuant to Oklahoma Attorney General Opinion No. 06-23, any Bidder that has assisted in preparing the Solicitation or developing the procurement terms, either directly or indirectly, is precluded from being awarded the Contract or from securing a sub-contractor that has provided such services.
- 15.4 Prior to award, the State may choose to request information from the Bidder to demonstrate its financial status and performance. If the Bidder is a subsidiary of another entity, the last three years audited financial statements of three years tax returns for the parent company may also be required.

The State reserves the right, in its sole discretion, to determine a Bidder's financial status and to withhold award to a Bidder who is not deemed financially responsible.

- 15.5** A notice of award may be in the form of a purchase order or other payment mechanism or in the form of a mutually executed contract.

BID PACKET SECTION FOUR: REQUESTED EXCEPTIONS TO TERMS
SOLICITATION NO. 3400001707

| Term & Section | Language |
|---|---|
| General Terms, Pricing (Section 5.2, pg. 7) EXAMPLE | Section 5.2 is deleted in its entirety and replaced with the following: Pursuant to 74 O.S. §85.40, all travel expenses of Supplier must be included in the total Acquisition price. Travel expenses include, but are not limited to, lodging, transportation and meal expenses. |
| Information Technology Terms, Appendix 1, Data Security (Section B.2, pg. 12) EXAMPLE | Section B.2 shall be modified to add the following: Customer is responsible for Personal Data encryption when solely in the Customer's possession. |
| Information Technology Terms, Source Code Escrow (Section 9, pg. 5) EXAMPLE | Section 9 is deleted in its entirety. |
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