



Solicitation#: 0900000510

Solicitation Issue Date: 09/02/2021

DUE DATES AND TIME (CENTRAL STANDARD TIME):

Bid Response:

3:00 p.m. on 10/06/2021

Request for administrative review:

3:00 p.m. on 09/13/2021

Questions:

3:00 p.m. on 09/28/2021

CONTRACT TYPE:

Agency:

Statewide:

Agency Name/ SW Number: SW1181

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 _____

1075

RETURN SEALED BID TO:

OMESCPeBID@omes.ok.gov

CONTRACTING OFFICER:

Name: Cini Zacharia

Email: cini.zacharia@omes.ok.gov

Phone No. 405-522-9078

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 260:115-3-9¹. 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 best value criteria, based on the following:
- i** Mandatory Requirements;
 - ii** Cost ;
 - iii** References;
 - iv** Experience;
 - v** Vendor Qualifications.

¹ OAC 260:115-3-9 is located at

http://www.oar.state.ok.us/oar/codedoc02.nsf/frmMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcbq8dtmmak31ctijujrgcln50ob7ckj42tbkdt374obdcli00

- C. As referenced in subsection 8.2.H, a VPAT; Security Certification and Accreditation Assessment; service level agreements and proposed first draft of Statement of Work are required to be included in the Bid.
- D. As referenced in subsection 8.2.I, full catalog pricing shall be proposed in a separate file utilizing the Price Template.
- E. As referenced in subsection 8.2.L, business references are required to establish that a Bidder has successful implementation experience.
- F. As referenced in subsection 8.2.M, 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
 - 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
- G. As referenced in subsection 8.2.H, bidder **must provide** responses to the following:
- i. Vendor Qualifications
 1. Provide a narrative that illustrates the vendor's understanding of the 911 Management Authority's requirements and project schedule.
 2. Provide a narrative that illustrates how the vendor will complete the scope of services, accomplish the required objectives, and meet the 911 Management Authority's project schedule.
 3. Provide a narrative that illustrates how the vendor will manage the project, ensure completion of the scope of services, and accomplish the required objectives with the 911 Management Authority project schedule.
 - ii. Capacity
 1. Describe in detail how the Learning Management System supports a flexible and scalable configuration that will accommodate the addition or subtraction of users and meet any expected increases over time.
 2. Describe any limits to the number of users that can access the LMS at any one time.
 3. Describe any limits to the number of users that can access a given course within the system at any one time.
 4. Describe any limits to the number of courses that can be offered or accessed per month/quarter/year.
 - iii. Software License Agreement and/or Service Agreements
 1. Provide any Software License Agreements and/or Service Agreements applicable to the proposed services.
 2. Describe in detail any hardware/software requirements to access the system.
 3. Describe in detail any specific operating systems or web browsers that are required to support access or use of the LMS.
 4. Describe what is required of the administrators and the end-users to install the program initially.

5. Describe any licensing requirements, if any, for administrators or end-users.

iv. LMS Bandwidth Requirements

1. Describe in detail the bandwidth requirements for access and optimal use of the LMS.

v. Performance and Escalation

1. Provide a brief written narrative describing the company's performance levels and outlining the escalation process.
2. Meet customer service expectations, including but not limited to dedicated representation and timely response, problem escalation, providing service level performance standards, etc.
3. Describe the methods used to ensure the authorized participant is the person completing the course content.
4. Describe the security features that are in place and how the system is protected.
5. Describe how passwords are used to maintain the security of the system.
6. Describe the various levels of security that is allowable in the system.
7. Describe in detail the security policies and procedures followed to ensure that all software and content is secure enough to release to users.

vi. Documentation

1. Bids shall include, as applicable, hosting provisions, Service Level Agreements (SLA's), Billing Information, Documentation, Training, Account Team/Support Provision, Escalation Process for each service.
2. An SLA that outlines the minimum service that a customer may expect for services, warranties, and support. The SLA should include an example performance report and a matrix for service credits that relate to the Bidders performance under the SLA.
3. Billing information that outlines what information is provided in billing the entity and how it is delivered.
4. Documentation that outlines how detailed documents of services that are provided to entities on an ongoing basis to include services by location and account information can be obtained.

vii. Multi-Media Accessibility

1. Describe all options and devices on which users can access the LMS.
2. The vendor shall describe the availability to access the system from multiple locations and/or devices.
3. The vendor shall describe any limitations to the number of users that can access the system at one time.

viii. System Maintenance, Updates, and Improvements

1. Describe what maintenance schedule is in place for updates, upgrades, changes, or system improvements.
2. Describe any downtime that can be expected during system updates, upgrades, changes, or improvements.
3. Describe the process for informing administrators and end-users of needed updates, upgrades, and improvements and the expected downtime.

4. Describe the frequency of any updates, upgrades, enhancements, or system improvements, and the average downtime that have been rolled out over the previous 5 years.
5. Describe any enhancements or upgrades that would result in additional costs above the annual contract.
6. Describe how their company receives input from administrators and end-users on recommendations for enhancements or improvements.

ix. Technical Support and Training

1. Describe in detail the technical support that will be offered to administrators and end-users during implementation and enrollment.
2. Describe in detail the technical support that will be offered to administrators and end-users while using the system.
3. Describe how technical support is logged and reported to administrators and end-users.
4. Describe how technical support is reached, and when technical support is available.
5. Describe the support and training that is available for program administrators and the time requirements to complete the administrative training.

x. System Access and Use

1. The vendor shall describe the method of enrolling new users.
2. The vendor shall describe the method of assigning an individual username and password to each user.
3. The vendor shall describe the online registration system and process to enroll new users.
4. The vendor shall describe the method of migrating user data from historical records housed by the Authority and/or local training records.
5. The vendor shall describe the steps administrators and end-users must complete to access the system and successfully use it.
6. The vendor shall describe the transferability of user information and access, should a user change agency.

xi. System Features

1. The system must allow users to log in manually with a username and password combination.
2. Describe the ability to create and manage user group configurations, including assigning group administrators.
3. Describe in detail the ability to deliver two varying types of courses: interactive, including content that may be televised or will be streaming live, and content that consists of written material only.
4. Describe the delivery of live/virtual classroom content and the platform that is used for delivery. If a third-party platform party is used, the vendor shall explain what the access requirements are for that.
5. Describe the capabilities to include videos, animations, sound bites, and other multimedia elements into courses.
6. Describe how closed captioning for courses is accomplished.

7. Describe how links are used within course content to refer users to other content and how administrators add links.
8. Describe what discussion or chat capabilities are there for users to interact with one another during each archived or static course.
9. Describe what discussion or chat capabilities are there for users to interact with one another during each live course.
10. Describe how users ask questions while in a live environment.
11. Describe how users ask questions of instructors or subject matter experts during archived or static courses.
12. Describe how live courses are captured and archived and how long each live course is available after the original release/streaming date.
13. Describe how the user accesses supplemental materials for courses. The vendor shall describe the ability of users to download, email, or print any supplemental materials provided.
14. Describe the process to modify courses that are already developed.
15. Describe the process that is used to create custom courses.
16. Describe the average development period for new course content as well as the average modification period for existing courses.
17. Describe the process that is used for users who would need to start/stop courses at different intervals and how each users' progress is saved. The vendor shall describe how this process works and would be navigated by the end-user.
18. Describe the process that ensures the same user that paused their course is the same user that completed it.
19. Describe the length of time the saved course would be available before it must be re-started from the beginning.
20. Describe the notification system, to include notification options, uncompleted courses, inactive thresholds, expiring certifications, and new course releases.
21. Include in their training program a Nationally Recognized Telephone CPR course as recommended by the State of Oklahoma.
22. Allow local or partnership courses and content to be uploaded and shared with all end-users based upon user permissions.
23. Allow certificates from outside the chosen vendor course content to be uploaded, maintained, and accessible based upon user permissions.
24. List all available 9-1-1 training material currently being offered as a service that will be included as part of this RFP response. If additional charges or costs are required, then this should be clearly listed.
25. Explain the process used to add additional 911 training as part of the on-going maintenance and/or service subscription that is part of this proposal.

xii. Testing and Evaluations

1. Describe the online course evaluation system.
2. Describe how tests and examinations are evaluated and scored.
3. Describe the process for users gaining access to certification examinations.
4. Describe the ability to provide stand-alone testing without being a course content subscriber.
5. Describe the ability of the program administrator to predefine scoring criteria and pass/fail thresholds.
6. Describe how feedback evaluation tools are created, disseminated, and collected for courses.
7. Describe who has access to the feedback and how feedback is used in the development of future courses.

xiii. Record Keeping and Recording

1. Describe its recordkeeping system and its basic functions, to include how records are kept, how long records are kept, accessibility to retrieve records, and storage and time limitations.
2. Describe how the system reports course completions and scores to the user and administrators.
3. Describe the features available to print, email, and/or save completion documentation or certificates for vendor courses and user uploaded/maintained courses.
4. Describe how successful course completions are reflected in the user's profile.
5. Describe the access control functionality, including administrative levels, tracking, and monitoring capabilities.
6. Describe access configuration, to include: State-level access to all records, ECD-level access for respective records, and PSAP/Agency level access for respective records.
7. Describe how individuals can access their records and how access to records is accomplished.
8. Describe the ability of users to download external certificates or track external education for continuing education requirements.
9. Describe the features and reporting tools available to track and monitor user activity.
10. Describe ability to track local courses and vendor courses separately and collectively.
11. Describe ability to track users if they move to other PSAPs within the State of Oklahoma.
12. Describe the report generation function, including standardized reports, and how ad hoc reports are developed.

xiv. Experience

1. Describe its experience providing 911 training as well as training to government entities, whether State or local.
2. Describe any courses or training that is currently offered for 911, emergency communications, public safety telecommunicators, or emergency medical dispatching.
3. Provide an online or in-person demonstration of the products in a live environment, at the request of the Board.
4. Describe the number of current product deployments, including any at a State level, and the number of single users on the current largest deployment.

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 260:115-3-9² 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 public. Additional information regarding information considered confidential by a Bidder is provided in Section 6 above.

² OAC 260:115-3-9 is located at

http://www.oar.state.ok.us/oar/codedoc02.nsf/frmMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcbq8dtmmak31ctijjrgcln50ob7ckj42tbkdt374obdcli00

- 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 Solicitation 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 template shall be inserted in this section at a Bid Packet page referencing the proposed Statement of Work. The State requires a template be provided for subsequent releases to be made. The template does not need to contain specific information.

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

Bidders may include an offer of value-added products and/or services. Such offer shall be inserted in this section and include associated pricing and detailed information relevant to such value-added offer. Only products and/or services within scope of the solicitation will be considered. However, the State is not obligated to purchase value-added products or services.

Third-Party products

Bidders may propose third-party products its authorized to resell such as hardware, peripherals, accessories and software by other manufacturers or publishers that may be used to enhance or extend the functionality of the Motorola or third-party products.

Leasing

In addition to purchases, OMES - ISD may agree to provisions that allow leasing of the products offered under the resulting contract. OMES is seeking the option to obtain a Lease that provides for paying for the use of equipment, not the ownership. Payments that are spread out over time and the equipment will be returned at lease end. The Bidder should provide any required leasing terms with the bid submission

K. Section Eleven: Financial Information

Not required with bid submission.

L. Section Twelve: Business References

Provide a total of three (3) references from government and/or private companies that have purchased a solution or service similar to the one(s) you are proposing in this response. Indicate the type of solution or service you provided for each reference given.

References provided should contain a contact person with full contact information (i.e. current employer, telephone number, mailing address, and email address). OMES is not responsible for references that do not respond. The State may deem a bid non-responsive for not providing the requested contact information.

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 RULES³ INCLUDING

³ Oklahoma Administrative Code Title 260, Chapter 115 is located at http://www.oar.state.ok.us/oar/codedoc02.nsf/frnMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcbq8dtmmak31ctijjrgcln50ob7ckj42tbkdt374obdcli00

WITHOUT LIMITATION OAC 260:115-3-7 AND 260:115-3-11⁴. 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 solely to OMESCPeBID@omes.ok.gov. Any Bid emailed directly to or cc'd to the Contracting Officer will not be reviewed by the Contracting Officer. In person, commercial carrier or facsimile submittals shall not be accepted. The subject line of the email Bid shall contain the following: **To the attention of the Contracting Officer; Solicitation Number and Bid Response Due Date and Time. The State is not responsible for incorrect link information or inability to access a submitted Bid.**
- 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 Manual⁵.
- 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.

⁴ 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=_75tnm2shfcdnm8pb4dthj0chedppmcbq8dtmmak3lctijjrgcln50ob7ckj42tbkdt374obdcli00

⁵ Statewide Accounting Manual is located at <https://omes.ok.gov/sites/g/files/gmc316/f/StatewideAccountingManual.pdf>.

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, 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 260:115-3-13⁶ 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.**⁷ Failure to comply with these Bidder Instructions may result in the

⁶ OAC 260:115-3-13 is located at

http://www.oar.state.ok.us/oar/codedoc02.nsf/frmMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcbq8dtmmak3lctijjrgcln50ob7ckj42tbkdt374obdcli00.

⁷ 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)⁸.
- 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.

⁸ OAC 260:115-3-5 and 260:115-7-32 is located at:

http://www.oar.state.ok.us/oar/codedoc02.nsf/frmMain?OpenFrameSet&Frame=Main&Src=_75tnm2shfcdnm8pb4dthj0chedppmcbq8dtmmak31ctijjrgcln50ob7ckj42tbkdt374obdcli00

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 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 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. 0900000510**

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.