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| J:\Function\Branding\- New OMES logo\Horizontal\OMES-logo-horiz-RGB.jpg |  | Amendment of Solicitation |

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| **Date of Issuance:** | 01/21/2022 | | **Solicitation No.** | | 1600000072 | | |
| **Requisition No.** | 1600004912 | | **Amendment No.** | | 1 | | |
| Hour and date specified for receipt of offers is changed: | | | No | Yes, to: |  | CST | |
| Pursuant to OAC 260:115-7-30(d), this document shall serve as official notice of amendment to the solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent.  Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:  (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,  (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope. | | | | | | | |
| **ISSUED BY and RETURN TO:** | | | | | | | |
| **U.S. Postal Delivery or Personal or Common Carrier Delivery:**  OMES Central Purchasing Will Rogers Building  ATTN:  2401 N. Lincoln Blvd., Ste. 116  Oklahoma City, OK 73105 | | Kimberley Coulter | | | | |  |
|  | | Contracting Officer | | | | |  |
|  | | N/A | | | | |  |
|  | | Phone Number | | | | |  |
|  | | Kimberley.Coulter@omes.ok.gov | | | | |  |
|  | | E-Mail Address | | | | |  |
| **Description of Amendment:** | | | | | | | |
| a. This is to incorporate the following: | | | | | | | |
| On behalf of the State of Oklahoma, the Office of Management and Enterprise Services (OMES) gives notice of the following questions concerning this solicitation, received during the Wiki QA period, which closed on 05/12/2021. All questions and procurement/agency responses are detailed below:  **Q1:** How many users will be active in the system?  **Response: B**etween 25-50  **Q2:** How many Agencies will be active in the system?  **Response:** 10 local agencies and the state, it may also be possible a third-party contractor may need access.  **Q3:** Estimated current customer count and projected customer count?  **Response:** Our customer count varies widely. Annually, in a "normal" year we weatherize ~250 homes, but some years its only 99. Congress recently authorized a large amount of additional funding, so I expect ~1,000 homes per year based on anticipated funding amounts over the next 5 program years.  **Q4:** What does “data” entail? (electronic, paper, quantity, format) Are we supposed to give an hourly figure for this because of unknowns?  **Response:** hard copy paper forms, PDF files, .wdz files from Weatherization Assistant 8.9 Oakridge (if possible), and Excel spreadsheets. We are open to solutions of any kind. Whether that is agencies simply hand typing in data, bulk entry of data, scanning in data, whatever might be a viable solution. Hourly or any other type of figure may work.  **Q5:** What does “Include government wide read-only access.” mean?  **Response:** This means that each local Subgrantee of the Oklahoma Department of Commerce (ODOC) would only be able to see its own information, but that ODOC would be able to read and access all information input into the database by the Subgrantees as we are the Funding source.  **Q6:** Are these other programs Weatherization related? Or are you referring to CSBG/LIHEAP/Other programs as well? Should we break out pricing for other programs separately?  **Response:** Any other programs added would ONLY be energy or housing related. For example, Healthy Homes or the DOE State Energy Program, or a lead-based paint program.  **Q7:** How is the referral supposed to be handled? Is there communication with other systems that would have to occur? If so, what is an estimate for the number of systems? If the database that receives the referral doesn’t allow us to integrate, are we liable in any way?  **Response:** We would look to the awarded Supplier to help us come up with a solution for this within the limitations. Most referrals are currently completed verbally or by hand.  **Q8:** Are these providers making API or access available?  **Response:** We do not know at this time, we would look to the awarded Supplier to help us with those conversations to see if it feasible and what is possible.  **Q9:** Would this be by integrating with another system? How is the mailing expected to be handled?  **Response:** No, we just want documents to be able to be hard copied printed so they can be physically mailed and not just handled electronically.  **Q10:** What format is the past data in? How many years of data is expected to be transferred?  **Response:** Excel spreadsheet - it is unknown at this time what ODOC will requirement, probably only 5 years.  **Q11:** What is expected to meet the level of secure? That we are storing them securely or are you expecting us to scan the files to make sure there’s no viruses, etc.?  **Response:** Please see the U.S. Department of Energy Weatherization Assistance Program's guidance on this: <https://www.energy.gov/sites/default/files/2015/12/f27/WAP-WPN-10-8.pdf>  **Q11:** Are you looking for HIPPA level tracking? Is there a requirement for HIPPA level tracking?  **Response:** No  **Q12:** Further explanation of what “Program must combine any files at time of creation and on a continued basis.” means?  **Response:** It means the system must be able to "combine" when the same person(s) has received weatherization multiple times (but at different homes) - they would be eligible because it is a different home. The system must also be able to "combine" when the same address is being weatherized (but with different person(s) living there)  **Q13:** Elaborate more on the off-line feature. Is this just for the accompanying mobile app or for the entire system?  **Response: P**referably both, but we are open to options.  **Q14:** Can we see a copy of the ODOC field guide to provide further context?  **Response:** Yes, it is publicly available on ODOC's website. https:// www.okcommerce.gov/wp-content/uploads/Retrofitting-Oklahoma-SWSAligned-Field-Guid  **Q15:** Is OMES/ODOC open for a custom developed solution hosted on cloud maintained by the vendor meeting the specific requirements as listed in the solicitation, or the agency is strictly looking for a Commercial Off The Shelf (COTS) software solution?  **Response:** We are open  **Q16:** Does OMES/ODOC prefer a specific cloud vendor, or open to any Cloud vendor? (Microsoft Azure, Amazon Web Services (AWS), Google Cloud, Oracle Cloud etc.)  **Response:** We have no preference  **Q17:**     Is there a specific timeline that OMES/ODOC is targeting to complete the project rollout, or the vendor is free to recommend their project timeline? This will help us to understand the need to onboard additional resources if we need to fast track the schedule.  **Response:** We are open, vendor is free to recommend a project timeline.  **Q18:** What is the approximate size of the legacy data that needs to be migrated?  **Response:** It’s in Excel files – and currently unknown as agencies will have to hand type information  **Q19:** What Database platform(s) currently used to host the legacy data?  **Response**: It’s in Excel files.  **Q20:** In the Bidder Instructions, page 4 of 15, it states, "The Bid is required to be structured into separate, labeled, and easily identifiable sections using the Bid Packet format provided below."  Are we required to submit each section (A to N) in different files which will comprise 14 different files, or can we include all sections (A to N) in a single Word file?  **Response:** It can be in a single Word file.  **Q21:** In the Bidder Instructions the Agency requires the bidder to provide Section Four: Requested Exceptions to Terms and Section Five: Additional Bidder Terms in Word format.  What format is required for the other sections?  **Response:** Bidder exceptions to terms are required to be provided in the table that is at the end of the Bidder Instructions.  It doesn’t matter if it’s a Word document or PDF  **Q22:** The Agency has not mentioned any instructions for the fonts (font type and size), margins, and page limits in the proposal.  Are there specific formats for this proposal?  **Response: No**  **Q23:** Proposal documents do not provide a specific format for the pricing information. Is there a standard format to submit the pricing (Excel, Word, etc.)?  **Response: No**  **Q24:** In Exhibit 1, Software Requirements, Section C, Mandatory Requirements for Data Access and Security:  Req #3 indicates Microsoft Work. Is this meant to be Microsoft Word?  **Response: Yes**  **Q25:** What is the expected number of total users and concurrent users for the new system?  **Response:** 25 – 50 users  **Q26:** Is the software required to store all changes in all fields across all screens?  **Response:** We are open to different solutions  **Q27:** If vendors system already includes a DOE approved energy audit, will OK be willing to use this system or will vendor still need to integrate with Wx Assistant 8.9?  **Response:** Vendors will still need to help us work with WX Assistant 8.9 – that is our DOE approved Energy Audit and how all our policies and procedures are written. We will consider moving to a new energy audit tool in the future, but it could take us several years to get DOE approval and update all our policies and procedures for such a change.  **Q28:** Do either of these existing programs have an API? If so, what kind?  **Response:** We would need the awarded vendor’s assistance to answer this question and to determine a solution, if its possible.  **Q29:** Could you clarify how the system must integrate mailing documents/applications to physical addresses?  **Response:** Printing out applications  **Q30:** Please clarify add/updating multiple projects in a download? Is this a data export of multiple project data?  **Response:** This may have been a typo, please disregard.  **Q31:** Does the system have to extract data from a scanned document and populate that data into system for use with financial work?  **Response:** This is the preferred solution, yes.  **Q32:** How much data needs to be migrated into the system? What is the data retention policy requested by OK?  **Response**: Homes that are weatherized need to be kept on file for at least 15 years (per DOE policy regarding weatherization); however, some data will only need to be kept for 5-7 years. It will vary depending on the type of data.  We don’t have an exact amount of data – agencies will have to work to hand type the data into an Excel file or other document for uploading into the new system. All data is currently kept on paper or on Excel spreadsheets.  **Q33:** The requirement that "The system will house the client Weatherization application" is saying that the proposed solution needs to be able to accept forms from clients requesting weatherization services, correct?  **Response**: Yes.  **Q34:** Could you please elaborate on the requirement that the system "Must pull raw data extracts from system and create custom queries"?  **Response:** Meaning we would like to pull any dataset that was entered ($ of insulation or # of ASHRAE fans or # of people) and create our own report or query.  **Q35**: What is the underlying database for OKGrants?  Is it hosted on-premises or in the cloud (and cloud provider), and is there an API available?  **Response:** We would need the awarded vendor to work with us on this. We don’t have all the answers to this at this time.  **Q36:** Which source would the "supply/inventory lists" in Section A, Requirement 13 come from - OKGrants or Weatherization Assistant?  **Response:** Neither – its currently on paper or Excel spreadsheets.  **Q37:** What is an example of the cost effectiveness output you expect to see for Section G, Requirement 3? This is defined by the Department of Energy in legislation.  **Response:** [See 10 CFR 440.](https://www.ecfr.gov/current/title-10/chapter-II/subchapter-D/part-440/section-440.21)21(e)  **Q38:** What are "connected" and "mobile" modes in Section H, Requirement 1?  **Response:** Connected = connected to the internet. Mobile = offline.  **Q39:** (Section A - Requirement 8) Could you please elaborate on the functionality that is needed from an offline solution?  **Response:** Energy auditors will need to be able to complete energy audits in the field in rural Oklahoma were there may be no internet availability. They will also need clients to be able to sign digital forms or be able to make notes on required forms that may need to be completed in the field. Quality Control Inspectors will need to be able to check work on the homes while in the field and complete required digital paperwork in the system.  **Q40:** Oklahoma Policy requires auditors and inspector’s complete data entry on state provided forms. Are system reports intended to be used in lieu of these forms?  **Response:** Yes. We would like the system to allow for users to either input data from handwritten forms or use digital forms. We are open to different solutions though.  **Q41:** While there is mention of plans to procure a new weatherization platform solution, there is no budget line item indicated. What is the budgeted amount set aside for this initiative?  **Response:** We cannot provide a budget amount as part of procurement.  **Q42:** DOE and LIHEAP are mentioned as funding sources for Weatherization. Are there any other funding sources currently?  **Response**: No, Oklahoma does not receive any other funding for weatherization at this time. We do not have utility funding.  **Q43:** Our SaaS pricing is based on the amount of funding being managed on the platform. We understand that actual PY2022 DOE funding is still unknown. What is the total approximate funding anticipated for weatherization in addition to $3.2 million for DOE (utility, LIHEAP, IIJA, other)?  **Response:** LIHEAP is $1.5 million. We anticipate an additional $40-$50,000 million with the upcoming stimulus funding (Infrastructure funding). Our funding has increased approximately 3-5% from DOE over the past few years for annual allocation. It has remained consistent for LIHEAP.  **Q44**: Draft plan indicates an expectation of 251 homes to be weatherized. What number of jobs should we assume for pricing in 2022 and four optional years beyond?  **Response:** 251 homes is the number of homes planned to be weatherized in 2022. Possibly as many as 300 with LIHEAP funding. We blend a lot of homes. With the infrastructure funding coming, we anticipate approximately an additional 1,000 homes per year for DOE. So, for each year, approximately 1,250 homes per year for the next 5 years.  **Q45:** So, you are sure to compare apples to apples between bidders, please estimate the number of users that should be licensed in the pricing for this proposal including ODOC staff, sub-grantees, installers, inspectors, and quality assurance personnel.  **Response:** 25 – 50 users.  **Q46:** What systems will this data be coming from? How will it be formatted?  **Response:** Paper and Excel Spreadsheets. We will look the awarded vendor to tell us how to format it.  **Q47:** How much data? Photos included? Documents included?  **Response:** We will want photos and documents yes. Probably only the last 12 months, maybe only 6 months? We will look to the awarded vendor to assist us with what is feasible. Everything is currently stored via hard copy/paper files.  **Q48:** Is this in lieu of Weatherization Assistant? If not, how would these calculations be used?  **Response:** No, but we may want to consider developing our own energy calculation in the future, but not at this time. Feel free to disregard.  **Q49:** Do funding sources have the same qualification and measure rules?  **Response:** Mostly, but there are some differences, and we are working on making new policies to make them more different in the near future.  **Q50**: Should a single job be able split cost between funding sources?  **Response:** Yes.  **Q51:** Should a single job be able split cost between funding sources?  **Response:** Yes.  **Q52:** Where can we review the requirements referenced here?  **Response**: <https://oklahoma.gov/omes/services/information-services/accessibility-standards.html>. | | | | | | | | |

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| b. All other terms and conditions remain unchanged. | | | | |
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| Supplier Company Name (**PRINT**) | | |  | Date |
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| Authorized Representative Name (**PRINT**) |  | Title |  | Authorized Representative Signature |