



Date of Issuance: 11/28/22

Solicitation No. 3400001761

Requisition No. 3400023792

Amendment No. 4

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:

Teresa Terry
Contracting Officer

Submit with Response

(405) 521-6679
Phone Number

teresa.terry@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 QA period, which closed on 11/21/2022. All questions and procurement/agency responses are detailed below:

- 1) Reference: Bidder Instructions 8.1.C and Exhibit 1.14, Page 5, 14. 100% of calls are recorded for evaluation by a supervisor and retained for 18 months.

Question: This seems to be a duplicative requirement with 8.1.C, Page 5 and Exhibit 1.23. Can the State please clarify if there is a difference between these two requirements?

Response: They are the same.

- 2) Reference: Bidder Instructions 8.1.C and Exhibit 1.21, Page 5, 21. Provide customer outreach to verify missing information or request required documents so that OSDH VR may process outstanding orders.

Question: To determine staffing need for this item, can you please provide the following outreach call metrics?

- Monthly outreach call volume
- Outreach call handle time

- Number of outreach attempts required per request

Response: No historical information to provide. Base staff needs off the call amounts shown on Exhibit price sheet.

Reference: Bidder Instructions 8.1.C and Exhibit 1.23, Page 5, 23. 100% of calls shall be recorded for evaluation by a supervisor and retained for 18 months.

Question: This seems to be a duplicative requirement with 8.1.C, Page 5 and Exhibit 1.14. Can the State please clarify if there is a difference between these two requirements?

Response: They are the same.

- 3) Reference: Bidder Instructions 9.6 and Exhibit – Pricing, Page 11 and Excel spreadsheet. 9.6 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.

Question: Should bidders include Implementation/Transition cost in the fixed fee or should these costs be presented separately? If they are to be presented separately, will the cost forms be updated to add a field for transition/implementation costs?

Response: The bidder should include all costs in the fixed fee.

- 4) Reference: Exhibit – Pricing, Excel spreadsheet. Pricing associated with the Bid shall be inserted in this section and shall be in the required structure set forth above in Subsection 8.1, if any.

Question: Exhibit – Price has an additional tab labeled “Sheet 1” for Year Two only and has different monthly call volumes from the tab labeled “Year 1 thru 5” which appears to be the primary tab we need to use. Can you please confirm that the tab “Sheet 1” was left in the workbook in error and only the tab labeled “Year 1 thru 5” should be completed.

Response: Yes, tab marked sheet 1 should be deleted. Use tab Year 1-5 only.

- 5) Reference: Exhibit 1, Page 1. 1. Shall utilize more than one operational call center location, and 2. Shall have the ability to transition services between multiple call center locations

Question: The RFP requests the bidder utilize more than one operational call center location. Presumably, the request for multiple physical locations is to provide for business continuity to ensure calls continue to be answered in the event of power outage or other service interruption. Our experience demonstrates that reducing the number of facilities to one and staffing a secondary pool of remote workers provides broad redundancy to ensure business continuity and offers a significant cost savings to our state customers. Would OSDH consider one physical location with some remote call center staff?

Response: The requirement is for the bidder to have more than one operational call center.

- 6) Reference: Exhibit 1, Page 1. 19. Service shall be 508 compliant [Section 508 of the Rehabilitation Act (29 U.S.C. §794 d)].

Question: Per Attachment B, section 9.10, pg. 13, compliance with Section 508 is only needed “If services provided by Supplier include delivery of an electronic communication, Supplier shall ensure such

communication and any associated support documents are compliant with Section 508 of the Federal Rehabilitation Act and with State standards regarding accessibility... Additionally, as part of compliance with accessibility requirements where documents are only provided in non-electronic format, Supplier shall promptly provide such communication and any associated support documents in an alternate format usable by individuals with disabilities upon request and at no additional cost, which may originate from an intended recipient or from the State.” The RFP scope requirements are specific to answering incoming calls to the Oklahoma Vital Records main line. Is there additional scope that requires the Bidder to deliver electronic communications and be 508 compliant?

Response: The bidder should be able to communicate with any caller who has hearing or speech disabilities.

- 7) Reference: Attachment A, Page 1. January-June 2022, Vital Records received ~91,000 calls.

Question: To provide the best possible model for customer service, can OSDH provide the bidders monthly volume reports of vital records calls received for the past two years?

Response: Due to a change in service models, earlier call volumes are not applicable.

- 8) Bidder Instructions 8.2.M “Section Thirteen: Additional Company Information” and 8.1.H, pages 10 and 5. 8.2.M Section Thirteen: Additional Company Information and 8.1.H As referenced in subsection 8.2.M, the following additional company information is required to be included in the Bid, all information should state how it relates to the scope of this contract...

Question: It appears that section 8.2.M Additional Company Information is misnumbered and should be section 8.2.O. If so, the reference to subsection 8.2.M in 8.1.H should be changed to subsection 8.2.O. Please confirm.

Response: Yes, that is a typo.

- 9) Reference: Bidder Instructions 8.2.N “Section Fourteen: Third Party Vendor Information” and 8.1.I, Pages 10 and 5. 8.2.N Section Fourteen: Third Party Vendor Information and 8.1.I As referenced in subsection 8.2.N, 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...

Question: It appears that section 8.2.N Third Party Vendor Information is misnumbered and should be section 8.2.P. If so, the reference to subsection 8.2.N in 8.1.I should be changed to subsection 8.2.P. Please confirm.

Response: Yes, that is a typo.

- 10) Reference: Bidder Instructions 8.2.F, page 6.

Question: The subsections in 8.2.F skip from 8.2.F.i to 8.2.F.iii – v. Please confirm this is just a numbering error and that no text is missing.

Response: Yes, that is a typo.

11) Reference: Bidder Instructions 8.2.F, page 6.

8.2.F. Section Three: Bid Portions Requested to be Held Confidential

- i. Any portion of the Bid that the Bidder requests be held confidential shall be listed in this section for independent review regarding confidentiality.... However, the Bid should not be broken apart such that the information requested to be held confidential is only found in this section; rather, such content should be included in the Bid in applicable sections, for efficient evaluation. If none, clearly mark "N/A"
- iii. For each portion of the Bid listed as considered confidential, the Bidder must identify the specific information considered confidential and 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 public.

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

v. ANY INFORMATION MARKED AS CONFIDENTIAL AND EMBODIED ELSEWHERE IN A BID RATHER THAN LISTED IN THIS SECTION OF THE BID PACKET WILL NOT BE CONSIDERED CONFIDENTIAL AND WILL BE SUBJECT TO DISCLOSURE WITHOUT FURTHER REVIEW....

Question: Please confirm that a separate redacted proposal is not required for confidential information.

Response: Refer to Bidders Instructions F: Section Three: v, a separate proposal is not required. All confidential items need to be listed in section 4 as stated in the Bidders Instructions.

12) Reference: Bidder Instructions 8.2.K, page 9.

8.2.K. 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 Acquisition specifications and requirements.
- ii. If an information technology VPAT is required, the URL link to the Bidder's VPAT shall be inserted in this section at a Bid Packet page referencing the VPAT.
- iii. If an information technology Security Certification and Accreditation Assessment is required (Required if offering a Hosted Solution), 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://oklahoma.gov/content/dam/ok/en/omes/documents/SecurityCertification-R.xlsxomes>.
- 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.

Question: Based on the proposed scope of work for this RFP which of the following items would be required to be submitted with the proposal?

- IT VPAT URL
- IT Security Certification and Accreditation Assessment
- Service Level Agreements
- Proposed Statement of Work

Response: The Security Assessment was part of the documents attached to the bid and need to be filled out. The statement of work will be your response to specifications unless you have a separate one. If the other items are applicable to your business please include.

13) Reference: Bidder Instructions 9.2, page 10. 9.2 A Bid shall be submitted via email solely to OMESCPeBID@omes.ok.gov. Please note that it is possible a Bidder's email system may have limitations on the size of outgoing email attachments and plan accordingly for the entire Bid to be received by the Bid Response Due Date and Time.

Question: Does the State's email system have any size limitations?

Response: The size will be limited on the vendors email size. If you need to separate into multiple emails please note so we can make sure we get them all.

- 14) Reference: Bidder Instructions 8.1C and Exhibit 1, page 5. iv. Bidder shall have experience with IP telephony and Avaya communications programming. 1. Supplier shall provide Interactive Voice Response (IVR) setup and usage for the duration of the contract.

Question: Will the vendor be expected to connect into the State's Automatic Call Distribution platform (such as Avaya), or will the vendor be providing a complete telephony solution?

Response: The state recently shifted away from utilizing Avaya so that is not required. We do require experience with IP telephony and communications programming along with IVR setup and usage.

- 15) Reference: Bidder Instructions 8.1.I & 8.2.O.N, Attachment B 13.3, and Exhibit 1, pages 5, 10, 17, and 1. I. As referenced in subsection 8.2.N, 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
- N. Section Fourteen: Third Party Vendor Information. Any required additional third party vendor information shall be inserted in this section.

13.3 If the Supplier is permitted to utilize subcontractors in support of the Contract, the Supplier shall remain solely responsible for its obligations under the terms of the Contract, for its actions and omissions and those of its agents, employees and subcontractors and for payments to such persons or entities. Prior to a subcontractor being utilized by the Supplier, the Supplier shall obtain written approval of the State of such subcontractor and each employee, as applicable to a particular Acquisition, of such subcontractor proposed for use by the Supplier. Such approval is within the sole discretion of the State. Any proposed subcontractor shall be identified by entity name, and by employee name, if required by the particular Acquisition, in the applicable proposal and shall include the nature of the services to be performed. As part of the approval request, the Supplier shall provide a copy of a written agreement executed by the Supplier and subcontractor setting forth that such subcontractor is bound by and agrees, as applicable, to perform the same covenants and be subject to the same conditions and make identical certifications to the same facts and criteria, as the Supplier under the terms of all applicable Contract Documents. Supplier agrees that maintaining such agreement with any subcontractor and obtaining prior written approval by the State of any subcontractor and associated employees shall be a continuing obligation. The State further reserves the right to revoke approval of a subcontractor or an employee thereof in instances of poor performance, misconduct or for other similar reasons.

25. Third party vendors shall be preapproved by agency

Question: Can OSDH please confirm that for this RFP a third-party vendor is defined as a subcontractor that fulfills any part of the contractual scope and not a supplier of products or services the Bidder will use to support standard operations (i.e. internet provider, Microsoft office suite, office supplies vendor, etc.). We request OSDH provide their definition of third-party vendor.

Response: That is correct. Any third party providing any part of the contractual scope is required to be preapproved.

16) Reference: Attachment A Purpose. The Contract is awarded on behalf of the Oklahoma State Department of Health to answer 100% of incoming calls to the Oklahoma Vital Records main line. Call center agents should be able to answer general questions about vital records, directly accept orders for certified copies of birth and death records or forward the customer to VitalChek (official program partner), and answer status questions about existing online orders.

Question: Can the state please confirm the vendor will be required to access state systems?

Response: The vendor will not be granted access to state systems or data. The vendor will be provided documentation and should also be able to access the public VR website.

17) Reference: Attachment A Purpose. The Contract is awarded on behalf of the Oklahoma State Department of Health to answer 100% of incoming calls to the Oklahoma Vital Records main line. Call center agents should be able to answer general questions about vital records, directly accept orders for certified copies of birth and death records or forward the customer to VitalChek (official program partner), and answer status questions about existing online orders.

Question: If the vendor is required to access state systems, can the state please confirm that the state system is accessed via a web browser. If not, please provide method of access. What technology would a vendor use to access the system remotely?

Response: The vendor will not be granted access to state systems or data. The vendor will be provided documentation and should also be able to access the public VR website.

18) Reference: Attachment A Purpose. The Contract is awarded on behalf of the Oklahoma State Department of Health to answer 100% of incoming calls to the Oklahoma Vital Records main line. Call center agents should be able to answer general questions about vital records, directly accept orders for certified copies of birth and death records or forward the customer to VitalChek (official program partner), and answer status questions about existing online orders.

Question: Will the state allow a network communication using an internet site secure Virtual Private Network (VPN) tunnel for accessing the state system?

Response: The vendor will not be granted access to state systems or data. The vendor will be provided documentation and should also be able to access the public VR website.

19) Reference: Attachment A Purpose. The Contract is awarded on behalf of the Oklahoma State Department of Health to answer 100% of incoming calls to the Oklahoma Vital Records main line. Call center agents should be able to answer general questions about vital records, directly accept orders for certified copies of birth and death records or forward the customer to VitalChek (official program partner), and answer status questions about existing online orders.

Question: Please confirm if access to the state system requires a VPN tunnel and/or Multi-factor Authentication (MFA)?

Response: The vendor will not be granted access to state systems or data. The vendor will be provided documentation and should also be able to access the public VR website.

20) Reference: Attachment A 1. Contract Term and Renewal Options. 1. Contract Term and Renewal Options. The initial Contract term, which begins on 2/1/2023 and will end 1/31/2024, and there are 4 one-year options to renew the Contract.

Question: Please confirm if the 2/1/2023 date will be the contract effective date with transition/implementation services to begin effective that date.

Response: The effective dates will be 2/1/23.

21) Reference: Bidder Instructions 8.1.B, page 4. B. The Bid will be evaluated using a best value criteria, based on the following:

- i Technical Specifications
- ii Price
- iii Experience
- iv References

Question: Please provide how the evaluation categories will be weighted.

Response: The state does not provide the weight of the categories being evaluated.

22) Reference: General

Question: Is there a third-party vendor currently providing this scope of work or does OSDH staff manage Vital Records calls today? This information allows prospective bidders to appropriately price either a transition of services or a net-new implementation.

Response: A third-party vendor is currently providing this scope of work.

23) Reference: Exhibit 1, page 1. 4. Supplier shall provide Interactive Voice Response (IVR) setup and usage for the duration of the contract.

Question: Will the bidder be required to facilitate any self-service within the IVR? If required, can OSDH please provide the API and/or web services.

Response: The vendor is required to provide Interactive Voice Response (IVR) setup and usage.

24) Reference: Exhibit 1, page 1. 4. Supplier shall provide Interactive Voice Response (IVR) setup and usage for the duration of the contract.

Question: Will the awarded vendor need to provide the IVR system as part of the solution or will the vendor configure (setup) an existing IVR system?

Response: The vendor shall provide Interactive Voice Response (IVR) setup and usage.

b. All other terms and conditions remain unchanged.

Supplier Company Name (**PRINT**)

Date

Authorized Representative Name (**PRINT**) Title

Authorized Representative Signature