



At the beginning of 2020, OMES Central Purchasing implemented a new contract structure.

A webinar was held in December to outline the changes; video of the online webinar link is available at the [State of Oklahoma Learn Center](#). All slides for the webinar are provided in Learn. A [shorter version of slides](#) are available on the [State Contract Structure web page](#).

What is the same?

The information an agency attaches to a requisition submitted to Central Purchasing is primarily the same except one new ask, listed as Number 1 below.

What is different?

There are two big differences:

1. The one agency ask:

An agency will need to compare its standard contract terms (formerly Section B of the RFP) to the [State General Terms](#).

Remove provisions in the agency terms that are duplicates of provisions in the General Terms. For many agencies, this de-duplicating has reduced terms to one or a few pages.

Note, an agency will go through this exercise once and afterward will need to revise its terms only as the agency requires for a specific acquisition. These terms will not be kept on file by OMES. Attach a list in Word format of contract terms the agency wishes to include in the procurement documents. If there are no agency specific terms needed, please confirm that.

2. While the information is the same, the form in which the information is provided and where it is placed in the procurement documents is not:

- The structure of documents is entirely different.
- The former RFP document, with sections A, B, C and so forth, is obsolete.
- Therefore, attaching the former RFP format to a requisition will delay issuance of the RFP.
- For a helpful crosswalk between the sections of the former RFP and the sections of the new contract structure, see the [slides from the December webinar](#).

What does an agency provide to OMES Central Purchasing?

An agency has the option of providing the procurement information with a requisition by either of two alternatives described below.

For agencies new to the change, Alternative 1 is recommended. OMES will schedule a planning meeting prior to the agency submitting information, if needed.

For agencies using Alternative 2, it may be helpful to use the online Acquisition Planning Worksheet as a guide.

Regardless of the alternative used by an agency, as usual, the procurement documents will be sent to the agency along with a suggested timeline for approval prior to issuance of the RFP.

Alternative 1:

To ensure a smooth transition from the obsolete templates to the new structure, an Acquisition Planning Worksheet is located below.

- The worksheet is used to capture information an agency attaches to the ePro requisition.
- The worksheet and any accompanying documents and exhibits are used by the contracting officer to “build” the procurement documents.
- Provide any list of exhibits as “Exhibit titled [insert title]. Avoid numbering or alphabetizing exhibits because the resulting contract will not include all exhibits and numbering/alpha falls out of order. Some exhibits relate to bidder instructions only and others relate to contract performance after award.
- Likewise, re-numbering exhibits at the time of award increases the likelihood that an exhibit to the resulting Contract will be missed.

Acquisition Planning Worksheet

All information should be clearly identified to correspond with the Worksheet questions and include necessary exhibits.

The information may be listed:

- within the acquisitions planning worksheet,
- or --
- some or all of the information may be attached separately to the worksheet.

Below describes typical information requested of an agency for attachment to an ePro requisition.

A. Purpose

1. Provide a few sentences below to explain the need for the Contract.

Example: this Contract is for SoonerCare waitlist management services. [Add context if desired]

B. Contract Term

1. What is the initial term of the Contract?
Examples: * one year
 * through June 30, 2020
2. When is the effective date of the Contract?
Examples: * the date of last signature
 * [a particular date]
3. Number of options to renew, if any?
4. What is the time period of any optional renewals?

- Examples:
- * one year
 - * two years

C. Sensitive Data

List all categories of sensitive data that will be accessed, processed, stored or transmitted by the Supplier.

Examples:

- HIPAA
- FERPA
- CJIS
- Federal Tax Information
- Personally identifiable information of individuals
- Critical infrastructure information
- Information relating to relationship of IT devices, configurations, schematics, etc.

D. Bid Evaluation

1. Provide the criteria that will be used to score Bids.

Examples:

- Technical specifications
 - Price and cost
 - Financial responsibility
2. Attach the evaluation tool which should match the criteria listed above.
 3. Identify the evaluation team members.

E. Bid Information and Requirements

1. Provide any desired historical usage, context, background information, etc.
2. Identify Mandatory Bid Requirements.
3. Identify Non-Mandatory Bid Requirements.
3. Provide details of other information to be included in the Bid, e.g., business references; value-added services; a required pricing structure.

Alternative 2:

If an agency prefers to insert the relevant information in the procurement documents and attach to the ePro requisition for review, the Acquisition Planning Worksheet and the templates are located on the [State Contract Structure web page](#).

- The procurement documents are explained in the December webinar referenced at the beginning of the webinar.
- The submitted information should include Bidder Instructions including Bid specifications; Attachment A, Solicitation; Attachment C, agency-specific terms and any required exhibits. Please note, however, all information relating to the Bid should be listed only in Section 8.1 of the Bidder Instructions.
- Attachment B, State General Terms and Attachment D, IT Terms (if applicable) need not be sent to the Purchasing Division.

- The Bid requirements, evaluation team and scoring criteria/tool are provided by the agency, as it has been in the past.

Bid Packet Format

The required Bid Packet Format contains sections as shown below.

The Bidder Instructions should state in which section particular information is required to be inserted so that evaluators are reviewing uniformly formatted Bids.

Section 1: Cover Page

Section 2: Required Forms, Certifications and Disclosures

Section 3: Bid Portions Requested to be Held Confidential

Section 4: Bidder Requested Exceptions to Terms

Section 5: Additional Bidder Terms

Section 6: Existing Terms between Bidder and State (that will apply to the resulting Contract)

Section 7: Executive Summary

Section 8: Response to Specifications and Requirements

Section 9: Pricing

Section 10: Offer of Value-Added Products and/or Services

Section 11: Financial Information

Section 12: Business References

Section 13: Additional Company Information

Summary:

The structure is new and, while a huge step forward, the structure will surely be tweaked as the state uses it in real life.

OMES Central Purchasing is here to guide and help agencies through the process.

All new template documents and the Acquisitions Planning Worksheet are located on the [State Contract Structure web page](#).

The old RFP format will not be accepted for Central Purchasing contracts as of July 1, 2020.

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