

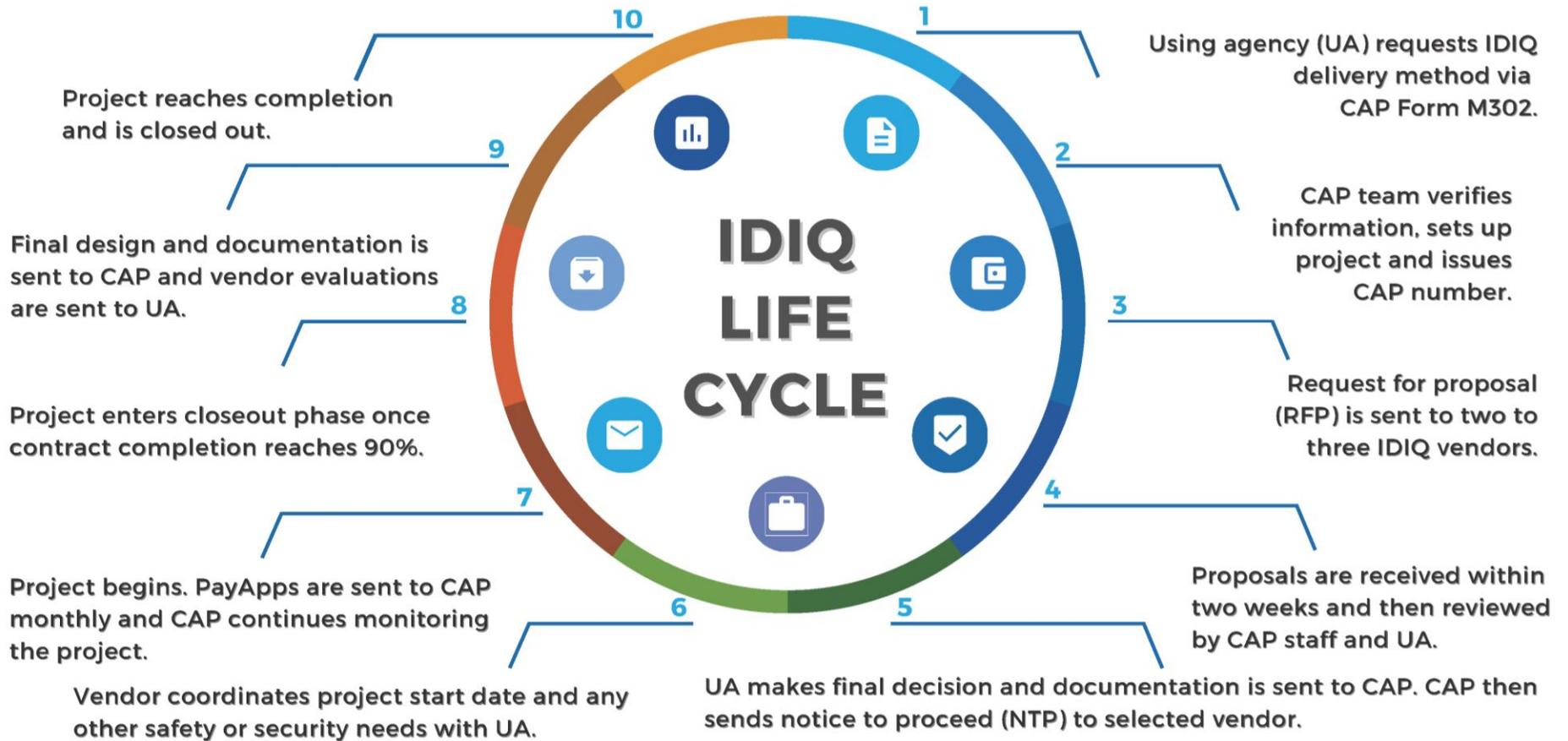
Welcome to CAP IDIQ

The non-mandatory Indefinite Delivery Indefinite Quantity (IDIQ) program was created as a purchasing solution to facilitate the quick delivery of professional consulting services to public agencies. It is available to all state agencies and various other state entities such as counties, municipalities, school districts and institutes of higher education. The IDIQ program applies to projects where the consultant fee is less than \$250,000 and the total project cost is less than \$2,500,000. OMES Capital Assets Management (CAM) Construction and Properties (CAP) has several contracts in place and provides consulting services for an administrative fee of 7% of the consultant's cost. Consultants are vetted and in good standing with the state. Several programs are available through IDIQ, including:

- Architectural and engineering services: General A&E services for construction projects or other nonconstruction consulting assignments.
- Construction inspection: The consultant confirms construction is following specifications through on-site visits and reporting.
- Environmental services: Surveys, assessments, monitoring and abatement for existing structures in the areas of air quality, mold, asbestos and lead.
- Geotechnical testing: Subsurface soil analysis and construction material testing. This service is normally conducted before the design of a new project and again during construction to ensure compliance with the contract documents.
- Land surveying: General surveying services for new constructions, building additions, property evaluations, land transactions and easements.
- Mitigation/abatement service: Services for lessening the impact of mold, fire, water, storm and other types of damage or infestations. The abatement of asbestos and lead-based paint services is also available through IDIQ.

At-a-glance overview of IDIQ and workflow

1. An agency requests an IDIQ service by submitting a completed CAP Form M302 to cap@omes.ok.gov.
2. The CAP program manager determines suitable IDIQ vendor(s).
 - a. The agency can also request a vendor.
3. The program manager sends the IDIQ vendor(s) a request for proposal (RFP) on behalf of the using agency (UA).
 - a. This is typically sent to two to three vendors with matching disciplines, among other criteria.
4. The IDIQ vendors send their proposal to the UA for review and consideration.
 - a. The program manager also reviews this proposal, advises the UA, and/or requests revisions from the selected vendor(s).
5. If the UA accepts the proposal, the UA sends the following list of items to CAP and the program manager:
 - a. A copy of the accepted, approved and signed proposal from the selected IDIQ vendor.
 - b. A completed CAP Form M701.
 - c. A project purchase order (PO) for the total project cost.
 - d. A PO (the PO number on the CAP Form M701 is acceptable) made out to CAP for the administrative fee based on the project's total cost and the CAP Fee Schedule (CAP Form M710).
6. Finally, the project is reviewed and approved by the program manager; a notice to proceed (NTP) is sent to the IDIQ vendor, and a CAP fee invoice is sent to the UA.
 - a. Please note there are rules, statutes and procedures not listed here that are available on the [CAP Rules & Statutes webpage](#).
 - b. All CAP forms are available on the [CAP Forms webpage](#).





WHAT IS IDIQ?

- Indefinite delivery, indefinite quantity.
- Intended to provide rapid consultant selection.
- Consultants are already vetted, and the contract is already in place.
- Provides a broad range of services, including:
 - Architectural and engineering, appraisals, construction inspection, environmental services, geotechnical services, land surveying, mitigation, and tradesman.
 - Full list included on CAP Form M254 (Vendor Registration Form).
- The consultant's fee cannot exceed \$250,000, and the associated construction cost, if any, cannot be estimated to exceed \$2,500,000.

[IDIQ website](#)



WHO CAN USE IDIQ?

- State agencies, cities, counties, municipalities, public and charter school districts, tech centers, and higher education institutions.
- Any state agency or political subdivision of the State of Oklahoma needing the guidance of architects, engineers and other design consultants for the purpose of providing design development, construction documents and construction phase services for the construction, remediation or renovation of state facilities.

WHY USE IDIQ?

- Quick delivery of professional consulting services to public agencies.
- Consultants are vetted and prequalified for faster selection process.
- Consultants are already under contract with CAP, further reducing delays in the selection process.

HOW DOES IDIQ WORK?

- An agency submits CAP Form M302 to CAP requesting an IDIQ service.
- The CAP program manager determines suitable IDIQ firms.
- The program manager sends a request for proposal to two or three IDIQ firms on behalf of the using agency.
- The IDIQ firms send the proposal to the using agency and program manager for review.
- The program manager reviews the proposal for compliance and advises the using agency.
- If the using agency accepts the proposal, it sends the specified items to CAP.
- The program manager reviews and approves the project and sends a notice to proceed to the IDIQ firm.
- The IDIQ firm submits monthly pay applications to CAP.
- The IDIQ firm works with CAP and the using agency to ensure the proper documents are submitted through project completion.

[CAP Form M302](#)



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IDIQ Project Process Standard Operating Procedure

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Owner	Dennis Pence	Reviewing unit	Construction and Properties

1. General statement of purpose.
 - 1.1. The purpose of this document is to identify the process for indefinite delivery/indefinite quantity (IDIQ) projects.
2. Scope.
 - 2.1. This document applies to the CAP program manager.
3. Discipline.
 - 3.1. Construction and Properties.
4. Terms and definitions.
 - 4.1. IDIQ - Indefinite delivery/indefinite quantity - a type of contract that provides for an indefinite quantity of supplies or services over an indefinite period of time.
 - 4.2. M302 form – form requesting an IDIQ/on-call consultant/contractor.
 - 4.3. D590 form – Vendor Evaluation form.
 - 4.4. M701 form – form requisitioning a project, provided by the using agency.
 - 4.5. M710 form – CAP Fee Schedule.
 - 4.6. B150 form – Master service agreement for value-added programs with consultant.
5. Instructions.
 - 5.1. This process begins when the using agency sends an M302 form to CAP requesting an IDIQ service.
 - 5.2. The program manager determines a suitable IDIQ firm(s).
 - 5.2.1. The using agency may request a firm.
 - 5.2.2. If the request is part of an existing CAP project, “yes” must be selected and the CAP project number must be listed in the field.
 - 5.2.3. The firm is determined based off evaluations (D590 form), location and scope of work.
 - 5.2.4. Registered CAP IDIQ consultants/contractors are as follows:
 - 5.2.4.1. Architects (planning, design, landscape).
 - 5.2.4.2. Engineers (civil, mechanical, electrical, structural, geotechnical, environmental consultant, construction inspector, environmental abatement contractor).
 - 5.2.4.3. Land surveyors (general land surveying, real estate appraisals, YellowBook, archaeological).
 - 5.2.5. If the project requires bidding, associated bidding and construction administration services are included, along with possible survey and soils testing.

- 5.2.6. If the project is for promotional and explorational purposes, then all documents produced by the consultant shall indicate that they are “preliminary not for construction.”
- 5.3. The program manager sends the request for proposal to two or three IDIQ firms on behalf of the using agency.
 - 5.3.1. The email template is in the I:Drive > CAP Programs > IDIQ > Email Templates (IDIQ).
- 5.4. The IDIQ firm sends the proposal to the using agency and program manager for review.
- 5.5. The program manager reviews the proposal for compliance and advises the using agency.
- 5.6. If the using agency accepts the proposal, then it sends the following items to CAP.
 - 5.6.1. Copy of accepted and signed proposal from the IDIQ firm.
 - 5.6.2. Completed M701 form, to be replaced with the Unifier portal.
 - 5.6.3. Project purchase order for the total project cost.
 - 5.6.4. Purchase order made out to CAP for the administrative fee based off the total cost and CAP fee schedule (M710 form).
 - 5.6.5. If the using agency does not accept the proposal, then the program manager sends a different IDIQ firm a request for proposal on behalf of the using agency.
- 5.7. The program manager reviews and greenlights the project and sends a notice to proceed to the IDIQ firm. The program manager also sends the CAP fee invoice to the using agency.
6. Roles and responsibilities.
 - 6.1. Using agency.
 - 6.1.1. Sends an M302 form to CAP requesting an IDIQ service.
 - 6.1.2. Sends the required items to CAP when accepting the proposal.
 - 6.2. CAP program manager.
 - 6.2.1. Maintains an up-to-date IDIQ firm directory.
 - 6.2.2. Determines suitable IDIQ firms.
 - 6.2.3. Sends the request for proposal to two or three IDIQ firms on behalf of the using agency.
 - 6.2.4. Reviews the proposal for compliance and advises the using agency.
 - 6.2.5. Reviews and greenlights the project and sends a notice to proceed to the IDIQ firm.
 - 6.2.6. Sends the CAP fee invoice to the using agency.
 - 6.2.7. Monitors and controls the project throughout its lifecycle on behalf of the using agency.
 - 6.3. IDIQ firm.
 - 6.3.1. Sends the using agency and program manager the proposal for review.
 - 6.3.2. Adheres to all processes and procedures as outlined in their IDIQ master agreement.
 - 6.3.3. Sends monthly payapps to the program manager.
7. Limitation or implementation notes.
 - 7.1. All consultant/contractor firms must be currently registered with CAP and Central Purchasing.
 - 7.2. All consultant/contractor firms must be enrolled in the IDIQ program through an annually executed B150 contract.
8. References.
 - 8.1. [CAM 02.07a IDIQ Project Process Map](#).

IDIQ project process map

