



State of Oklahoma
State Department of Education
Purchasing Division

Solicitation Cover Page

1. Solicitation #: 2650000364 2. Solicitation Issue Date: 05/03/2019

3. Brief Description of Requirement:

The Oklahoma State Department of Education (OSDE) seeks an external evaluation services to support the Native Youth Community Project grant awarded by the U.S. Department of Education by gathering data, providing data analysis and assessment, and completing federal reporting data for Annual Performance Reports.

Prospective Bidders are urged to read this solicitation carefully. All responses must be received by 3:00 p.m. CT/CDT May 15, 2019.

4. Response Due Date¹: May 15, 2019 Time: 3:00 CST/CDT

5. Issued By and RETURN SEALED BID TO²:

U.S. Postal Delivery Address: 2500 N. Lincoln Blvd,
Ste 429
Oklahoma City, OK 73105

Common Carrier Delivery Address: Same As Above

Electronic Submission Address: _____

6. Solicitation Type (type "X" at one below):

- ☐ Invitation to Bid
☒ Request for Proposal
☐ Request for Quote

7. Contracting Officer:

Name: Amber Mihm
Phone: 405-522-4511
Email: amber.mihm@sde.ok.gov

¹ Amendments to solicitation may change the Response Due Date (read GENERAL PROVISIONS, section 3, "Solicitation Amendments").

² If "U.S. Postal Delivery" differs from "Carrier Delivery", use "Carrier Delivery" for courier or personal deliveries.



Responding Bidder Information

*"Certification for Competitive Bid and Contract" **MUST** be submitted along with the response to the Solicitation.*

1. RE: Solicitation # 2650000364

2. Bidder General Information:

FEI / SSN : _____ Supplier ID: _____

Company Name: _____

3. Bidder Contact Information:

Address: _____

City: _____ State: _____ Zip Code: _____

Contact Name: _____

Contact Title: _____

Phone #: _____ Fax #: _____

Email: _____ Website: _____

4. Oklahoma Sales Tax Permit³:

☐ YES – Permit #: _____

☐ NO – Exempt pursuant to Oklahoma Laws or Rules – Attach an explanation of exemption

5. Registration with the Oklahoma Secretary of State:

☐ YES - Filing Number: _____

☐ NO - Prior to the contract award, the successful bidder will be required to register with the Secretary of State or must attach a signed statement that provides specific details supporting the exemption the supplier is claiming (www.sos.ok.gov or 405-521-3911).

6. Workers' Compensation Insurance Coverage:

Bidder is required to provide with the bid a certificate of insurance showing proof of compliance with the Oklahoma Workers' Compensation Act.

☐ YES – Include with the bid a certificate of insurance.

☐ NO – Exempt from the Workers' Compensation Act pursuant to 85A O.S. § 2(18)(b)(1-11) – Attach a written, signed, and dated statement on letterhead stating the reason for the exempt status.⁴

³ For frequently asked questions concerning Oklahoma Sales Tax Permit, see <https://www.ok.gov/tax/Businesses/index.html>

⁴ For frequently asked questions concerning workers' compensation insurance, see <https://www.ok.gov/wcc/Insurance/index.html>

7. Disabled Veteran Business Enterprise Act

- ☐ YES – I am a service-disabled veteran business as defined in 74 O.S. §85.44E. Include with the bid response 1) certification of service-disabled veteran status as verified by the appropriate federal agency, and 2) verification of not less than 51% ownership by one or more service-disabled veterans, and 3) verification of the control of the management and daily business operations by one or more service-disabled veterans.
- ☐ NO – Do not meet the criteria as a service-disabled veteran business.

Authorized Signature

Date

Printed Name

Title



**Certification for Competitive
Bid and/or Contract
(Non-Collusion Certification)**

NOTE: A certification shall be included with any competitive bid and/or contract exceeding \$5,000.00 submitted to the State for goods or services.

Agency Name: Oklahoma State Department of Education Agency Number: 265

Solicitation or Purchase Order #: _____

Supplier Legal Name: _____

SECTION I [74 O.S. § 85.22]:

A. For purposes of competitive bid,

1. I am the duly authorized agent of the above named bidder submitting the competitive bid herewith, for the purpose of certifying the facts pertaining to the existence of collusion among bidders and between bidders and state officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to said bid;
2. I am fully aware of the facts and circumstances surrounding the making of the bid to which this statement is attached and have been personally and directly involved in the proceedings leading to the submission of such bid; and
3. Neither the bidder nor anyone subject to the bidder's direction or control has been a party:
 - a. to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding,
 - b. to any collusion with any state official or employee as to quantity, quality or price in the prospective contract, or as to any other terms of such prospective contract, nor
 - c. in any discussions between bidders and any state official concerning exchange of money or other thing of value for special consideration in the letting of a contract, nor
 - d. to any collusion with any state agency or political subdivision official or employee as to create a sole-source acquisition in contradiction to Section 85.45j.1. of this title.

B. I certify, if awarded the contract, whether competitively bid or not, neither the contractor nor anyone subject to the contractor's direction or control has paid, given or donated or agreed to pay, give or donate to any officer or employee of the State of Oklahoma any money or other thing of value, either directly or indirectly, in procuring this contract herein.

SECTION II [74 O.S. § 85.42]:

For the purpose of a contract for services, the supplier also certifies that no person who has been involved in any manner in the development of this contract while employed by the State of Oklahoma shall be employed by the supplier to fulfill any of the services provided for under said contract.

The undersigned, duly authorized agent for the above named supplier, by signing below acknowledges this certification statement is executed for the purposes of:

☐ the competitive bid attached herewith and contract, if awarded to said supplier;

OR

☐ the contract attached herewith, which was not competitively bid and awarded by the agency pursuant to applicable Oklahoma statutes.

Supplier Authorized Signature

Certified This Date

Printed Name

Title

Phone Number

Email

Fax Number

A. GENERAL PROVISIONS

A.1. Definitions

As used herein, the following terms shall have the following meaning unless the context clearly indicates otherwise:

- A.1.1. "Acquisition" means items, products, materials, supplies, services, and equipment an entity acquires by purchase, lease purchase, lease with option to purchase, or rental;
- A.1.2. "Addendum" means a written restatement of or modification to a Contract Document executed by the Supplier and State.
- A.1.3. "Bid" means an offer in the form of a bid, proposal, or quote a bidder submits in response to a solicitation;
- A.1.4. "Bidder" means an individual or business entity that submits a bid in response to a solicitation;
- A.1.5. "Solicitation" means a request or invitation by the State Purchasing Director or a state agency for a supplier to submit a priced offer to sell acquisitions to the state. A solicitation may be an invitation to bid, request for proposal, or a request for quotation; and
- A.1.6. "Supplier" or "vendor" means an individual or business entity that sells or desires to sell acquisitions to state agencies.

A.2. Bid Submission

- A.2.1. Submitted bids shall be in strict conformity with the instructions to bidders and shall be submitted with a completed Responding Bidder Information, OMES-FORM-CP-076, and any other forms required by the solicitation.
- A.2.2. Bids shall be submitted to the procuring agency in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.
- A.2.3. The required certification statement, "Certification for Competitive Bid and/or Contract (Non-Collusion Certification)", OMES-FORM-CP-004, must be made out in the name of the bidder and must be properly executed by an authorized person, with full knowledge and acceptance of all its provisions.
- A.2.4. All bids shall be legible and completed in ink or with electronic printer or other similar office equipment. Any corrections to bids shall be identified and initialed in ink by the bidder. Penciled bids and penciled corrections shall NOT be accepted and will be rejected as non-responsive. In addition to a hard copy submittal, the bidder will also be required to submit an electronic copy. Electronic responses must be submitted in the identical format contained in the solicitation (for example Microsoft Word, Microsoft Excel, but not Adobe PDF). In the event the hard copy of the price worksheets and electronic copy of the price worksheets do not agree, the electronic copy will prevail.
- A.2.5. All bids submitted shall be subject to the Oklahoma Central Purchasing Act, Central Purchasing Rules, and other statutory regulations as applicable, these General Provisions, any Special Provisions, solicitation specifications, required certification statement, and all other terms and conditions listed or attached herein—all of which are made part of this solicitation.

A.3. Solicitation Amendments

- A.3.1. If an "Amendment of Solicitation", OMES-FORM-CP-011, is issued, the bidder shall acknowledge receipt of any/all amendment(s) to solicitations by signing and returning the solicitation amendment(s). Amendment acknowledgement(s) may be submitted with the bid or may be forwarded separately. If forwarded separately, amendment acknowledgement(s) must contain the solicitation number and response due date and time on the front of the envelope. The procuring agency must receive the amendment acknowledgement(s) by the response due date and time specified for receipt of bids for the bid to be deemed responsive. Failure to acknowledge solicitation amendments may be grounds for rejection.
- A.3.2. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the solicitation. All amendments to the solicitation shall be made in writing by the procuring agency.
- A.3.3. It is the bidder's responsibility to check frequently for any possible amendments that may be issued. The procuring agency is not responsible for a bidder's failure to download any amendment documents required to complete a solicitation.

A.4. Bid Change

If the bidder needs to change a bid prior to the solicitation response due date, a new bid shall be submitted to the procuring agency with the following statement "This bid supersedes the bid previously submitted" in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.

A.5. Certification Regarding Debarment, Suspension, and Other Responsibility Matters

By submitting a response to this solicitation:

A.5.1. The prospective primary participant and any subcontractor certifies to the best of their knowledge and belief, that they and their principals or participants:

A.5.1.1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal, State or local department or agency;

A.5.1.2. Have not within a three-year period preceding this proposal been convicted of or pled guilty or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) contract; or for violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

A.5.1.3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph A.5.1.2. of this certification; and

A.5.1.4. Have not within a three-year period preceding this application/proposal had one or more public (Federal, State, or local) contracts terminated for cause or default.

A.5.2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to its solicitation response.

A.6. Bid Opening

Sealed bids shall be opened by the Amber Mihm located at 2500 N. Lincoln Blvd,
Ste 429, Oklahoma City, OK at the time and date specified in the solicitation as the Response Due Date and Time.

A.7. Open Bid / Open Record

Pursuant to the Oklahoma Public Open Records Act, a public bid opening does not make the bid(s) immediately accessible to the public. The procurement or contracting agency shall keep the bid(s) confidential, and provide prompt and reasonable access to the records only after a contract is awarded or the solicitation is cancelled. This practice protects the integrity of the competitive bid process and prevents excessive disruption to the procurement process. The interest of achieving the best value for the State of Oklahoma outweighs the interest of vendors immediately knowing the contents of competitor's bids. [51 O.S. § 24A.5(5)]

Additionally, financial or proprietary information submitted by a bidder may be designated by the Purchasing Director as confidential and the procurement entity may reject all requests to disclose information designated as confidential pursuant to 62 O.S. (2012) § 34.11.1(H)(2) and 74 O.S. (2011) § 85.10. Bidders claiming any portion of their bid as proprietary or confidential must specifically identify what documents or portions of documents they consider confidential and identify applicable law supporting their claim of confidentiality. The State Purchasing Director shall make the final decision as to whether the documentation or information is confidential pursuant to 74 O.S. § 85.10. Otherwise, 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 or the solicitation is cancelled.

A.8. Late Bids

Bids received by the procuring agency after the response due date and time shall be deemed non-responsive and shall NOT be considered for any resultant award.

A.9. Legal Contract

A.9.1. Submitted bids are rendered as a legal offer and any bid, when accepted by the procuring agency, shall constitute a contract.

A.9.2. The Contract resulting from this solicitation may consist of the following documents in the following order of precedence:

A.9.2.1. Any Addendum to the Contract;

A.9.2.2. Purchase order, as amended by Change Order (if applicable);

A.9.2.3. Solicitation, as amended (if applicable); and

A.9.2.4. Successful bid (including required certifications), to the extent the bid does not conflict with the requirements of the solicitation or applicable law.

A.9.3. Any contract(s) awarded pursuant to the solicitation shall be legibly written or typed.

A.10. Pricing

A.10.1. Bids shall remain firm for a minimum of sixty (60) days from the solicitation closing date.

A.10.2. Bidders guarantee unit prices to be correct.

A.10.3. In accordance with 74 O.S. §85.40, ALL travel expenses to be incurred by the supplier in performance of the Contract shall be included in the total bid price/contract amount.

A.11. Manufacturers' Name and Approved Equivalents

Unless otherwise specified in the solicitation, manufacturers' names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition. Bidder may offer any brand for which they are an authorized representative, and which meets or exceeds the specification for any item(s). However, if bids are based on equivalent products, indicate on the bid form the manufacturer's name and number. Bidder shall submit sketches, descriptive literature, and/or complete specifications with their bid. Reference to literature submitted with a previous bid will not satisfy this provision. The bidder shall also explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. Bids that do not comply with these requirements are subject to rejection.

A.12. Clarification of Solicitation

A.12.1. Clarification pertaining to the contents of this solicitation shall be directed in writing to the Contracting Officer specified in the solicitation, and must be prior to the closing date of the solicitation.

A.12.2. If a bidder fails to notify the State of an error, ambiguity, conflict, discrepancy, omission or other error in the SOLICITATION, known to the bidder, or that reasonably should have been known by the bidder, the bidder shall submit a bid at its own risk; and if awarded the contract, the bidder shall not be entitled to additional compensation, relief, or time, by reason of the error or its later correction. If a bidder takes exception to any requirement or specification contained in the SOLICITATION, these exceptions must be clearly and prominently stated in their response.

A.12.3. Bidders who believe proposal requirements or specifications are unnecessarily restrictive or limit competition may submit a written request for administrative review to the contracting officer listed on the solicitation. This request must be made prior to the closing date of the solicitation.

A.13. Negotiations

A.13.1. In accordance with Title 74 §85.5, the State of Oklahoma reserves the right to negotiate with one, selected, all or none of the vendors responding to this solicitation to obtain the best value for the State. Negotiations could entail discussions on products, services, pricing, contract terminology or any other issue that may mitigate the State's risks. The State shall consider all issues negotiable and not artificially constrained by internal corporate policies. Negotiation may be with one or more vendors, for any and all items in the vendor's offer.

A.13.2. Firms that contend that they lack flexibility because of their corporate policy on a particular negotiation item shall face a significant disadvantage and may not be considered. If such negotiations are conducted, the following conditions shall apply:

A.13.3. Negotiations may be conducted in person, in writing, or by telephone.

A.13.4. Negotiations shall only be conducted with potentially acceptable offers. The State reserves the right to limit negotiations to those offers that received the highest rankings during the initial evaluation phase.

A.13.5. Terms, conditions, prices, methodology, or other features of the bidders offer 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 in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the offer.

- A.13.6. The requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the State determines that a change in such requirements is in the best interest of the State Of Oklahoma.

A.14. Rejection of Bid

The State reserves the right to reject any bids that do not comply with the requirements and specifications of the solicitation. A bid may be rejected when the bidder imposes terms or conditions that would modify requirements of the solicitation or limit the bidder's liability to the State. Other possible reasons for rejection of bids are listed in OAC 260:115-7-32.

A.15. Award of Contract

- A.15.1. The State Purchasing Director 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 by the State Purchasing Director to be in the best interest of the State of Oklahoma.
- A.15.2. Contract awards will be made to the lowest and best bidder(s) unless the solicitation specifies that best value criteria is being used.
- A.15.3. In order to receive an award or payments from the State of Oklahoma, suppliers must be registered. The vendor registration process can be completed electronically through the OMES website at the following link: <https://www.ok.gov/dcs/vendors/index.php>.

A.16. Contract Modification

- A.16.1. The Contract is issued under the authority of the State Purchasing Director who signs the Contract. The Contract may be modified only through a written Addendum, signed by the State Purchasing Director and the supplier.
- A.16.2. Any change to the Contract, including but not limited to the addition of work or materials, the revision of payment terms, or the substitution of work or materials, directed by a person who is not specifically authorized by the procuring agency in writing, or made unilaterally by the supplier, is a breach of the Contract. Unless otherwise specified by applicable law or rules, such changes, including unauthorized written Addendums, shall be void and without effect, and the supplier shall not be entitled to any claim under this Contract based on those changes. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the resultant Contract.

A.17. Delivery, Inspection and Acceptance

- A.17.1. Unless otherwise specified in the solicitation or awarding documents, all deliveries shall be F.O.B. Destination. The supplier(s) awarded the Contract shall prepay all packaging, handling, shipping and delivery charges and firm prices quoted in the bid shall include all such charges. All products and/or services to be delivered pursuant to the Contract shall be subject to final inspection and acceptance by the State at destination. "Destination" shall mean delivered to the receiving dock or other point specified in the purchase order. The State assumes no responsibility for goods until accepted by the State at the receiving point in good condition. Title and risk of loss or damage to all items shall be the responsibility of the supplier until accepted by the receiving agency. The supplier(s) awarded the Contract shall be responsible for filing, processing, and collecting any and all damage claims accruing prior to acceptance.
- A.17.2. Supplier(s) awarded the Contract shall be required to deliver products and services as bid on or before the required date. Deviations, substitutions or changes in products and services shall not be made unless expressly authorized in writing by the procuring agency.

A.18. Invoicing and Payment

- A.18.1. Upon submission of an accurate and proper invoice, the invoice shall be paid in arrears after products have been delivered or services provided and in accordance with applicable law. Invoices shall contain the purchase order number, a description of the products delivered or services provided, and the dates of such delivery or provision of services. An invoice is considered proper if sent to the proper recipient and goods or services have been received.
- A.18.2. State Acquisitions are exempt from sales taxes and federal excise taxes.
- A.18.3. Pursuant to 74 O.S. §85.44(B), invoices will be paid in arrears after products have been delivered or services provided.
- A.18.4. Payment terms will be net 45. Interest on late payments made by the State of Oklahoma is governed by 62 O.S. § 34.72.

- A.18.5. Additional terms which provide discounts for earlier payment may be evaluated when making an award. Any such additional terms shall be no less than ten (10) days increasing in five (5) day increments up to thirty (30) days. The date from which the discount time is calculated shall be the date of a proper invoice.

A.19. Tax Exemption

State agency acquisitions are exempt from sales taxes and federal excise taxes. Bidders shall not include these taxes in price quotes.

A.20. Audit and Records Clause

- A.20.1. As used in this clause, "records" includes books, documents, accounting procedures and practices, and other data, regardless of type and regardless of whether such items are in written form, in the form of computer data, or in any other form. In accepting any Contract with the State, the successful bidder(s) agree any pertinent State or Federal agency will have the right to examine and audit all records relevant to execution and performance of the resultant Contract.
- A.20.2. The successful supplier(s) awarded the Contract(s) is required to retain records relative to the Contract for the duration of the Contract and for a period of seven (7) years following completion and/or termination of the Contract. If an audit, litigation, or other action involving such records is started before the end of the seven (7) year period, the records are required to be maintained for two (2) years from the date that all issues arising out of the action are resolved, or until the end of the seven (7) year retention period, whichever is later.

A.21. Non-Appropriation Clause

The terms of any Contract resulting from the solicitation and any Purchase Order issued for multiple years under the Contract are contingent upon sufficient appropriations being made by the Legislature or other appropriate government entity. Notwithstanding any language to the contrary in the solicitation, purchase order, or any other Contract document, the procuring agency may terminate its obligations under the Contract if sufficient appropriations are not made by the Legislature or other appropriate governing entity to pay amounts due for multiple year agreements. The Requesting (procuring) Agency's decisions as to whether sufficient appropriations are available shall be accepted by the supplier and shall be final and binding.

A.22. Choice of Law

Any claims, disputes, or litigation relating to the solicitation, or the execution, interpretation, performance, or enforcement of the Contract shall be governed by the laws of the State of Oklahoma.

A.23. Choice of Venue

Venue for any action, claim, dispute or litigation relating in any way to the Contract shall be in Oklahoma County, Oklahoma.

A.24. Termination for Cause

- A.24.1. The supplier may terminate the Contract for default or other just cause with a 30-day written request and upon written approval from the procuring agency. The State may terminate the Contract for default or any other just cause upon a 30-day written notification to the supplier.
- A.24.2. The State may terminate the Contract immediately, without a 30-day written notice to the supplier, when violations are found to be an impediment to the function of an agency and detrimental to its cause, when conditions preclude the 30-day notice, or when the State Purchasing Director determines that an administrative error occurred prior to Contract performance.
- A.24.3. If the Contract is terminated, the State shall be liable only for payment for products and/or services delivered and accepted.

A.25. Termination for Convenience

- A.25.1. The State may terminate the Contract, in whole or in part, for convenience if the State Purchasing Director determines that termination is in the State's best interest. The State Purchasing Director shall terminate the contract by delivering to the supplier a Notice of Termination for Convenience specifying the terms and effective date of Contract termination. The Contract termination date shall be a minimum of 60 days from the date the Notice of Termination for Convenience is issued by the State Purchasing Director.
- A.25.2. If the Contract is terminated, the State shall be liable only for products and/or services delivered and accepted, and for costs and expenses (exclusive of profit) reasonably incurred prior to the date upon which the Notice of Termination for Convenience was received by the supplier.

A.26. Insurance

The successful supplier(s) awarded the Contract shall obtain and retain insurance, including workers' compensation, automobile insurance, medical malpractice, and general liability, as applicable, or as required by State or Federal law, prior to commencement of any work in connection with the Contract. The supplier awarded the Contract shall timely renew the policies to be carried pursuant to this section throughout the term of the Contract and shall provide the procuring agency with evidence of such insurance and renewals.

A.27. Employment Relationship

The Contract does not create an employment relationship. Individuals performing services required by this Contract are not employees of the State of Oklahoma or the procuring agency. The supplier's employees shall not be considered employees of the State of Oklahoma nor of the procuring agency for any purpose, and accordingly shall not be eligible for rights or benefits accruing to state employees.

A.28. Compliance with the Oklahoma Taxpayer and Citizen Protection Act of 2007

By submitting a bid for services, the bidder certifies that they, and any proposed subcontractors, are in compliance with 25 O.S. §1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and available at www.dhs.gov/E-Verify.

A.29. Compliance with Applicable Laws

The products and services supplied under the Contract shall comply with all applicable Federal, State, and local laws, and the supplier shall maintain all applicable licenses and permit requirements.

A.30. Special Provisions

Special Provisions set forth in SECTION B apply with the same force and effect as these General Provisions. However, conflicts or inconsistencies shall be resolved in favor of the Special Provisions.

TABLE OF CONTENTS

A. GENERAL PROVISIONS 6

B. SPECIAL PROVISIONS13

C. SOLICITATION SPECIFICATIONS.....13

D. EVALUATION16

E. INSTRUCTIONS TO BIDDER17

F. CHECKLIST17

G. OTHER18

H. PRICE AND COST18

B. SPECIAL PROVISIONS

B.1. Contract Period

This contract will be effective from July 1, 2019 through June 30, 2020, and may be renewed for three (3) additional one-year periods with the same terms and conditions upon the sole discretion of the Oklahoma State Department of Education (OSDE).

B.2. Extension of Contract

The State may extend the term of this contract for up to ninety (90) day intervals if mutually agreed upon by both parties in writing.

B.3. Approval of Contract

The supplier shall not commence work, commit funds, incur costs, or in any way act to obligate the state until so notified in writing of the approval of the contract. The authorized state representative is the only individual who can transmit the approval to the supplier.

B.4. Invoices

- B.4.1.** Invoices are to be submitted monthly by email to SDEaccounts payable@sde.ok.gov
- B.4.2.** Pursuant to 74 O.S. §85.44(B), invoices will be paid in arrears after services have been provided. Interest on late payments made by the State of Oklahoma is governed by 62 O.S. §34.71 and 62 O.S. §34.72.
- B.4.3.** Invoice remittance shall in every case possible be paid by Electronic Fund Transfer (EFT). Title 62 O.S. §34.64(H) requires that payments from the State Treasury shall be conveyed solely through an electronic payment mechanism. New Vendors doing business with the OSDE for the first time must contact the Office of Management and Enterprise Services at Vendor.EFT@omes.ok.gov to make arrangements to receive payment electronically.

B.5. Supplier Employees or Agents

The provisions of this agreement bind supplier's employees or agents, if any, who perform services for the state under this agreement. At the request of the state, supplier shall provide adequate evidence that such persons are their employees or agents. In accordance with the section on "employment relationship", the state shall not be responsible for supplier's employees for any employee compensation insurance, paid vacation, or any other employee benefit.

B.6. Changes

All suppliers' changes after award, including changes of the actual employees performing services on this contract, are subject to approval by the state.

B.7. Definitions

- B.7.1.** OSDE – Oklahoma State Department of Education
- B.7.2.** NYCP – Native Youth Community Project
- B.7.3.** OFNL – Oklahoma Future Native Leaders Project
- B.7.4.** GPRA – Government Performance Results Act
- B.7.5.** PII – Personally Identifiable Information

B.8. Student Data Accessibility, Transparency and Accountability

- B.8.1.** Supplier's ability to provide services under this Agreement requires OSDE to share student data containing confidential personally identifiable information ("PII") from education records maintained by OSDE with Supplier. Supplier agrees to comply with all state and federal laws relating to student data and privacy, including the Family Educational Rights and Privacy Act, (20 U.S.C § 1232g; 34 CFR Part 99) ("FERPA") and the Oklahoma Student Data Accessibility, Transparency, and Accountability Act of 2013, (70 O.S. § 3-168).
- B.8.2.** Student data released to the Supplier will be limited to data points specifically listed in this Agreement. If the Supplier determines that there is a legitimate need to receive or access additional student data/information and that such information is necessary to perform required duties/responsibilities, the Supplier shall submit a written request to OSDE detailing the information

needed and state the purpose of the disclosure. If OSDE determines that access is necessary and appropriate, this Agreement may be modified in accordance with request. No information shall be provided until the Agreement is modified to reflect additional/subsequent data disclosures.

- B.8.3.** The Supplier will safeguard the confidentiality and integrity of all data received pursuant to this Agreement, place limitations on its use, and maintain compliance with all applicable privacy laws. The Supplier shall establish appropriate administrative, technical and physical safeguards to ensure the security and confidentiality of all student data.
- B.8.4.** Student information from education records cannot be published in a way that would allow individual students or their parents to be identified. Any reports or published information that is a result of or derived from confidential student data containing PII provided by OSDE shall not allow individuals to be directly or indirectly identified and shall contain no student level data. The Supplier may use student information from education records to perform contractual duties as required by this Agreement, but any published results must be presented in a manner which protects the privacy and confidentiality of individuals involved. The OSDE shall be provided the opportunity to review all results prior to publication.
- B.8.5.** The Supplier shall require all staff to comply with the data security and confidentiality provisions set forth herein. Only those employees that are directly involved in performing tasks outlined herein and who have a legitimate interest in providing services according to the terms of this Agreement shall be entitled to access student data. The Supplier shall take steps to maintain the confidentiality of student information from education records.
- B.8.6.** This Agreement does not constitute a release of student-level data for the requestor's discretionary use. Access to (or disclosure of) confidential student information contained from education records pursuant to the terms of this Agreement shall not constitute an assignment of ownership of the information provided. OSDE retains all ownership rights to the data transferred pursuant to this Agreement, and the Supplier shall not obtain any right, title, or interest in any of the data furnished by OSDE.
- B.8.7.** OSDE data may only be used to carry out responsibilities throughout the duration of the projects/task/assignments specified herein. OSDE data may only be used to perform the duties specified in this Agreement. Any unauthorized use of the data files beyond the terms specified in the Agreement is not permitted. The Supplier shall not use the data for purposes other than the projects/task/assignments identified herein.
- B.8.8.** The Supplier shall immediately notify the OSDE if there is any unauthorized access or breach to the information provided by the OSDE and take reasonable steps to mitigate any breach. In the event a breach occurs, the Supplier will take reasonable steps and implement corrective procedures to ensure that further breaches do not occur.
- B.8.9.** The OSDE shall be notified immediately if the Supplier receives a request for the student data containing PII provided by the OSDE. If the Supplier becomes legally compelled to disclose any confidential PII (whether by judicial or administrative order, applicable law, rule or regulation, or otherwise, then the Supplier shall use all reasonable efforts to provide the OSDE with prior notice before disclosure so that OSDE may seek a protective order or other appropriate remedy to prevent the disclosure. If a protective order or other remedy is not obtained prior to when any legally compelled disclosure is required, the Supplier shall only disclose that portion of the confidential PII that it is legally required to disclose.
- B.8.10.** The Supplier may determine that it is necessary to employ a subcontractor to fulfill contractual obligations under the contract. The Supplier shall ensure, by written agreement, that any subcontractor employed by the Supplier remains in compliance with (FERPA), 20 USC § 1232g; 34 CFR Part 99, and the Oklahoma Student Data Accessibility, Transparency, and Accountability Act of 2013, 70 O.S. § 3-168. The OSDE shall enter into a Data Sharing Agreement with any Supplier or subcontractor employed by the Supplier, or require the Supplier to enter into that agreement with its subcontractor(s), prior to the release of any student data or personally identifiable information.
- B.8.11.** The OSDE will immediately terminate this agreement and this agreement shall not be renewed due to the breach of any of the terms and conditions of the data security and confidentiality provisions set forth herein by the Supplier and OSDE may revoke any other existing RFPs or contract with the Supplier.

- B.8.12.** The OSDE may seek monetary, retribute, and punitive damages against the Supplier for a breach of any of the terms and conditions of the data security and confidentiality provisions set forth herein as allowed by law.
- B.8.13.** Upon notification of a breach in the terms and conditions of the data security and confidentiality provisions set forth herein, the OSDE will not release any additional confidential personally identifiable information ("PII") from education records maintained by OSDE to the Supplier.
- B.8.14.** Upon completion of the services detailed in this agreement or upon termination of this agreement, the Supplier shall immediately destroy all PII that was disclosed by the OSDE and provided to the Supplier for the purposes detailed in this agreement. Within ten (10) days of destruction, the Supplier shall provide written notification to the OSDE of the date and method of destruction of these records.

C. SOLICITATION SPECIFICATIONS

C.1. Statement of Purpose

- C.1.1.** The Oklahoma State Department of Education (OSDE) will implement a Native Youth Community Project that is centered on the goal of ensuring that Native American students enrolled in high school in Riverside Indian School, and McAlester, Calvin, and El Reno Public Schools are prepared for college and careers. The project will initiate activities such as college readiness educational activities including concurrent and Advanced Placement coursework, a focus on math and science course rigor, college visits, career/college academic plans, scholarship completion, tutoring and mentoring, college application exercises, a summer native student institute, an annual student leadership summit, and career exploration opportunities.
- C.1.2.** The purpose of this RFP is to obtain competitive proposals for external evaluation services to support the Native Youth Community Project grant awarded by the U.S. Department of Education by gathering data, providing data analysis and assessment, and completing federal reporting data for Annual Performance Reports.

C.2. Mandatory Qualifications

- C.2.1.** The supplier must have a minimum of three (3) years' experience in external evaluation services and hold a Master's Degree in Education, Statistics, Communications, Tribal Studies, or similar degree.

C.3. Scope of Service

The supplier is to state in its response any experience it has with each requirement and exactly how it plans to comply with all requirements of this section, providing detailed information and stating affirmatively its understanding of the requirements.

- C.3.1.** The program evaluation must include formative and summative evaluation processes using qualitative and quantitative measures. Results of the external evaluation will be used by OSDE to guide program development in the short-term as well as reporting purposes at the conclusion of each year of the grant and the conclusion of the grant and long-term planning.
- C.3.2.** The supplier will report directly to and work closely with OSDE Grant Project Director in revising evaluation activities and questions, communicating evaluation findings, and supporting the decision-making process by supplying relevant and timely information.
- C.3.3.** The supplier will be responsible for collecting and documenting evidence of implementation and impact of the Native Youth Community Project training and implementation in the four school districts over the course of the four year project.
- C.3.4.** The supplier will be responsible for collecting and documenting evidence of implementation and impact of the Native Youth Community Project training and implementation in the four school districts over the course of the four year project.
- C.3.5.** The supplier must design and analyze professional development evaluation rubrics for teacher content specific training purposes for school staff.
- C.3.6.** The external evaluator must create an account with the National Student Clearinghouse and collect and analyze graduating student data beginning with students who graduate high school in the four identified districts in 2019 through 2022.

- C.3.7.** The external evaluator must create student accounts for the Gallup Student Poll each fall beginning in October 2019 for all students in grades 9-12 to take the survey on measuring their hope and engagement each grant year through October 2022.
- C.3.8.** The external evaluator will assist in collecting data at the baseline and at least quarterly, when appropriate, that will focus on determining the extent to which: (1) Project timelines, measurable objectives and projected outcomes for these objectives are met; (2) Problems are quickly identified and successfully resolved; (3) Expenditures are reviewed for consistency with the approved budget; (4) The plan of operation and all applicable regulations, policies, and procedures are followed; (5) Evaluation tasks are completed, data summarized, and reports written, approved, and distributed; (6) Annual and final outcomes are achieved and documented; and (7) The project affects targeted students positively and improves high school graduation rates and college enrollment rates.
- C.3.9.** The external evaluator will assist in collecting student Advanced Placement enrollment and completion data through data from the College Board, and student college concurrent enrollment data at all four participating high school sites.
- C.3.10.** The external evaluator will assist in the collection of American Indian student senior scholarships each project year to determine the amount of financial aid offered to participating students.
- C.3.11.** The external evaluator will assist in the review of all participating student Individual College and Career Academic Plans (ICAPs) online portfolios each year of the project.

C.4. Performance Activities

- C.4.1.** The OSDE has established specific, measurable objectives that will be used for data reporting purposes for this grant based on G.P.R.A. performance measures established by Congress. These include:
 - C.4.1.1.** Increase by 10% the percentage of American Indian students who meet the ACT benchmark score in each content area by the end of their senior year.
 - C.4.1.2.** Increase by 10% the number of students enrolled in, and completing AP and concurrent college courses by the end of their senior year.
 - C.4.1.3.** The percentage of American Indian students on track for graduation at the end of each grade will increase 5% per year.
 - C.4.1.4.** The percentage of American Indian students who graduate from high school will increase 5% per year as measured by district data.
 - C.4.1.5.** The percentage of American Indian students who are enrolled in college will increase 5% per year as measured by National Student Clearinghouse data.
 - C.4.1.6.** The number of community collaborative efforts that promote college and career readiness of American Indian students will increase by 25% per year.
 - C.4.1.7.** Increase students' career awareness by 10% each year as measured by pre/post career awareness surveys.
 - C.4.1.8.** Increase American Indian students' sense of school engagement and hope by 4% per year.
 - C.4.1.9.** Increase American Indian student scholarship awards including OK Promise, Free Application for Federal Student Aid (FAFSA), and local scholarships by 25%.

D. EVALUATION

D.1. Best Value

This RFP will be evaluated as best value in accordance with Title 74 O.S. § 85. The best value criterion for this proposal is listed below and all proposals will be reviewed and awarded based on the following evaluation criteria:

- D.1.1.** Price in Section H.1.
- D.1.2.** Mandatory Qualifications in Section C.2
- D.1.3.** Scope of Service in Section C.3

D.1.4. Performance Activities in Section C.4

D.1.5. Additional Requirements in Section C.5

D.2. Best and Final Offer

The state may request best and final offers if deemed necessary, and shall determine the scope and subject of any best and final request. However, the supplier should not expect an opportunity to strengthen its offer and should submit its best offer based on the terms and conditions set forth in the solicitation.

D.3. Demonstrations & Clarifications Questions

The state reserves the right to request demonstrations and questions clarifications from any or all responding bidders.

E. INSTRUCTIONS TO BIDDER

E.1. Introduction

E.1.1. Prospective Bidders are urged to read this solicitation carefully. Failure to do so will be at the Bidder's risk. Provisions, terms, and conditions may be stated or phrased differently than in previous solicitations. Irrespective of past interpretations, practices or customs, proposals will be evaluated and any resultant contract(s) will be administered in strict accordance with the plain meaning of the contents hereof. The Bidder is cautioned that the requirements of this solicitation can be altered only by written amendment approved by the state and that verbal communications from whatever source are of no effect. In no event shall the Bidder's failure to read and understand any term or condition in this solicitation constitute grounds for a claim after contract award.

E.1.2. By submitting a proposal in response to this RFP, the supplier represents they have read and understand the scope of services and have familiarized itself with all federal, state, and local laws, ordinances, and rules and regulations that in any manner may affect the cost, progress, or performance of the contract work.

E.1.3. The failure or omission of any supplier to receive or examine any form, instrument, addendum, or other documents or to acquaint itself with conditions existing will in no way relieve any supplier from any obligations with respect to its proposal or to the contract.

E.2. Response Submission and Copies:

E.2.1. Supplier is to submit four (4) electronic copies of their complete response to include scanned images of the required completed and signed forms. Electronic copy can be in Word, Excel, or PDF format; but, is to be an unprotected document provided on CD, DVD, or thumb drive for a total of four (4) electronic documents in a "machine readable" format.

E.2.2. Faxed or emailed responses will not be accepted. Original hard copies are not required or preferred. This overrides hard copy submittal requirements of A.2.4. PDF is an acceptable format for solicitation responses. This overrides requirements of A.2.4

E.2.3. Proposal Response Format

Proposals should be prepared in the format described below. Failure to comply with the specified format may lead to a supplier's proposal being declared non-responsive.

E.2.3.1. OSDE is especially concerned that the format of the proposal sequentially responds to the Mandatory Qualifications, Scope of Service, and Performance Activities that are to be addressed within the solicitation.

E.2.3.1.1. The supplier should restate the service or requirement and then state its response.

E.2.3.1.2. The supplier should assign consecutive page numbers in its response.

F. CHECKLIST

F.1. Vendor Response

Listed below is a checklist of items that are to be completed and returned with the proposal. This is not an all-inclusive list and it is the Vendor's responsibility to ensure that they submit all required and requested documentation:

- F.1.1.** OMES Form CP 076 – Responding Bidder Information
- F.1.2.** OMES Form CP 004 –Certification for Competitive Bid and/or Contract
- F.1.3.** Response to all Proposal Requirements in Section C.
- F.1.4.** Vendor Payee form, if applicable. The Vendor Payee form is provided for the responding Supplier that is a new, non-registered payee. OMES Vendor Management requires the information in the attached form before payments can be made to the supplier.
- F.1.5.** Four (4) electronic copies (E.2.1.)
- F.1.6.** OMES Form CP 021 – Supplier contract Certification

G. OTHER

G.1. Questions

- G.1.1.** All questions regarding this solicitation must be submitted in writing and are to be emailed no later than **May 6, 2019, at 3:00 PM** Central Daylight Time. Questions are to be emailed to amber.mihm@sde.ok.gov. Questions received after this date will not be answered. An Amendment will be posted after this deadline listing all questions received and their answers.
- G.1.2.** Any communication regarding this solicitation must be sent to the Contracting Officer listed above. Failure to do so (contacting the agency directly), may result in a Bidder's response being deemed non-responsive.

H. PRICE AND COST

H.1. Price Submission

- H.1.1.** Suppliers must submit a complete budget sheet for all years of this contract outlining all costs associated with this service.
- H.1.2.** Supplier must submit a detailed budget sheet and budget narrative to include a minimum of four (4) quarterly site visits with the project staff in Oklahoma City, OK, monthly data collection from the identified four school districts in contract years 1-4, including student grade advancement, student graduation rates, student enrollment and completion of Advanced Placement courses, student enrollment and completion of concurrent enrollment, student Gallup Poll survey results, student graduation and college going data from the National Student Clearinghouse in November of each year beginning in 2019 with baseline data collected in June 2019, student ACT score data, four site visits per year to the four school districts, and evaluation instrument creation as defined in Scope of Services, explaining the expenses of all expenditures related to this RFP.
 - H.1.2.1.** Pertaining to Travel Costs: See O.S. Title 74, Section 8.40
- H.1.3.** Supplier must submit yearly pricing for each contract period:
 - H.1.3.1.** July 1, 2019 through June 30, 2020
 - H.1.3.2.** July 1, 2020 through June 30, 2021
 - H.1.3.3.** July 1, 2021 through June 30, 2022
- H.1.4.** Please list any other anticipated cost that will be associated with this service.
- H.1.5.** Bidders are encouraged to include in their proposals value added options that the state may or may not elect to purchase during the term of this contract. Value added options must be specific to the purpose of this RFP and pertinent to the work to be prepared under the terms of this contract.