



RFP Services: Consulting Services
RFP Number: 8070001092

Section D Evaluation and Award Instructions

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D.1. Evaluation Process

Following the closing of the RFP, an administrative review and evaluation process will be conducted to determine the responsiveness and priority of the received proposals, and to identify minor deficiencies or informalities.

1. Administrative Review

- a. Determines if a Proposal meets all the following requirements to be considered responsive:
 - i. Proposal is received by the OHCA Contracting Officer by the date and time specified in the RFP or Amendment to the RFP.
 - ii. Proposal is completed and submitted in accordance with the requirements described in the RFP; a checklist is provided in Attachment 2.
 - iii. Amendments, if issued, are acknowledged, signed and provided.
 - iv. Financial Viability documents are provided.
 - v. Pricing is submitted in the designated format and is within any “not to exceed” limitations.
 - vi. The Bidder did not impose terms or conditions that would modify requirements of the RFP, impose terms not in the best interest of the state, or limit the Bidder’s liability to the state.
 - vii. Meeting all requirements outlined above allows the Bidder to proceed in the evaluation process. Failure to meet all of the above may result in the proposal being disqualified from further evaluation.
- b. Minor Deficiency
 - i. Minor deficiency or minor informality means an immaterial defect in a Proposal or variation in a Proposal from the exact requirements of a solicitation that may be corrected or waived without prejudice to other bidders. A minor deficiency or informality does not affect the price, quantity, quality, delivery or conformance to specifications and is negligible in comparison to the total cost or scope of the acquisition.

- ii. OHCA may waive minor deficiencies or informalities in a Proposal if the deficiencies or informalities do not prejudice the rights of other bidders, or are not a cause for Proposal rejection.
- 2. Best Value Evaluation Process:
 - a. Stage 1 - Mandatory Requirements
 - i. Stage 1 of the evaluation process will be an administrative review conducted in order to determine compliance with the general guidelines, not-to-exceed pricing, and format requirements of this RFP as outlined in Section A and Section C.
 - ii. All Mandatory Requirements as described in Section A and Section C must be met in order for a response to be further evaluated. Inability to meet any Mandatory Requirements will be grounds to disqualify a response from further consideration.
 - iii. All responses passing Stage 1 of the review process will move on to Stage 2 – Best Value Evaluation.
 - b. Stage 2 – Best Value Evaluation
 - i. Stage 2 of the evaluation process will consist of a Best Value evaluation of the received responses, conducted by an evaluation team comprised of various subject matter experts knowledgeable in their respective fields.
 - ii. The following submittals will be reviewed and evaluated during Stage 2 of the review process.
 - 1. Responses to Attachment 4 – Technical Narrative Question
 - 2. Responses to Attachment 5 – Potential Optional Services
 - c. Stage 3 – Pricing Evaluation
 - i. Scoring of Attachment 6 – Pricing shall be conducted separately using a predetermined method of calculation. The scoring shall be distributed to the evaluation team during this stage of the evaluation.
 - ii. Additionally, a thorough review of each Bidder’s financial status will be conducted, utilizing the audited financial statements requested in Section C – Instructions to Bidder. Any Bidder that fails a financial viability review will be precluded from continuing in the evaluation process.
 - d. Stage 4 – Bidder Interviews
 - i. Stage 4 of the evaluation process may include interviews. Interviews are not guaranteed to be conducted, and the Bidder shall not expect that OHCA will request interviews to give the Bidder an opportunity to strengthen the Bidder’s submitted proposal.
 - ii. OHCA may invite some or all Bidders to participate in interviews. If only some Bidders are invited, OHCA will invite Bidders with the highest evaluation scores from Stage 2 and Stage 3. Interviews will focus on the Bidder’s plans for each project and understanding of the organization and individuals.
 - iii. If interviews are held, OHCA shall interview the Key Personnel defined in Section A, Table 2 for this RFP. If OHCA decides to utilize the interview process, it will work with the selected Bidders as much as possible in arranging times and flights for those interviews.

- iv. OHCA may interview Key Personnel separately or may interview as a group. No other individuals may participate or attend the interview unless invited by OHCA. Interviews shall last no more than 20 minutes for each individual.
- v. OHCA may request additional information from Bidders prior to subsequent interviews.
- vi. Upon completing the final Stage of the evaluation, OHCA will determine final scores and may invite the highest scoring Bidder to proceed to contract negotiations prior to final contract award.

D.2. Proposal Clarification Questions

1. OHCA may ask the Bidder to provide supporting documentation or clarifications for any information in the proposal at any time until Contract Award.
2. Clarifications take place prior to final scoring. The evaluation team must mutually agree upon clarification requests. The evaluation team will submit clarification requests to the contract officer, who will obtain required information from the bidder in writing and return those vendor responses to the evaluation team.

D.3 Competitive Negotiations of Proposals

1. In accordance with Oklahoma Statutes, Title 74 subsections 85.5, OHCA reserves the right to negotiate with one, selected, all, or none of the Bidders responding to this RFP to obtain the best value for OHCA. Negotiations could entail discussions on products, services, pricing, Contract terminology or any other issue that mitigate OHCA's risks. OHCA will consider all issues negotiable and not artificially constrained by internal corporate policies. Negotiation may be with one or more Bidders, for any and all items in the Bidder's proposal.
2. Bidders that contend they lack flexibility because of their corporate policy on a particular negotiation item will face a significant disadvantage and may not be considered. If such negotiations are conducted, the following conditions shall apply:
 - a. Negotiations shall be conducted in writing.
 - b. Negotiations shall only be conducted with potentially acceptable proposals. OHCA reserves the right to limit negotiations to those proposals that received the highest rankings during evaluation Stages 2 and 3.
 - c. Terms, conditions, prices, methodology, or other features of the Bidder's proposal 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 proposal.
 - d. The mandatory requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless OHCA determines that a change in such requirements is in OHCA's best interest.
 - e. BEST and FINAL – OHCA may request best and final offers if deemed necessary, and will determine the scope and subject of any best and final request. However, the Bidder shall not expect that OHCA will ask for best and final offers

to give the Bidder an opportunity to strengthen the Bidder's submitted proposal. Therefore, the Bidder must submit the best offer based on the terms and condition set forth in this RFP.

D.4. Contract Approval

In order to ensure OHCA's goal of securing enhanced Federal Financial Participation (FFP) and OHCA matching funds, any contract award may be contingent upon Federal, Oklahoma State, and OHCA review and approval. Every effort will be made by OHCA, both before and after selection, to expedite the approval procedure.

D.5. Notice of Award

1. The successful Bidder shall be notified they have been selected for award, and before the official award, the following shall be requested to be completed:
 - a. In order to receive an award or payments from the State of Oklahoma, Bidder must be a registered vendor. The Bidder registration process can be completed electronically through the website at the following link:
<https://www.ok.gov/dcs/vendors/index.php>.
 - b. The successful Bidder shall register with the Secretary of State or shall attach a signed statement that provides specific details supporting the exemption the supplier is claiming. The Oklahoma Secretary of State contact information is as follows: www.sos.ok.gov or 405-521-3911.
 - c. Bidder is required to provide a certificate of liability insurance showing proof of compliance with Section C.12 of the OHCA Terms and Conditions Document:
2. A notice of award in the form of a purchase order or other contract documents resulting from this RFP shall be furnished to the successful Bidder and shall result in a binding Contract.
3. Notification of award shall also be posted on the OHCA website.