



State of Oklahoma
Office of Management and Enterprise Services
Central Purchasing Division

Amendment of Solicitation

Date of Issuance: 2/10/2014

Solicitation No. 0550000001

Requisition No. 0550000001

Amendment No. 1

Hour and date specified for receipt of offers is changed: ☐ No ☒ Yes, to: 2/18/2014 3:00 PM CST/CDT

Pursuant to OAC 580:16-7-30(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:**

Office of Management and Enterprise Services,
Central Purchasing Division
Will Rogers Building
2401 N. Lincoln Blvd., Suite 116
Oklahoma City, OK 73105

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Description of Amendment:

a. This is to incorporate the following:

Closing date has been extended to 2/18/2014

Please see the below answers to vendor questions. No further questions shall be accepted

1. Is there an incumbent previously providing these or similar services?

There is no incumbent providing these services.

2. What is the expected funding level for this award?

There is not an expected funding level for the award. We haven't had this level of service in the recent past and have no gauge for the cost.

3. Are proposals from joint ventures accepted (A joint venture is a legal organization of two firms, that would otherwise be separate, coming together for the purposes of a specific project)?

Proposals from joint ventures are accepted.

Description of Amendment - continuing

4. Who is/are the primary Project Sponsor(s)/primary point(s) of contact, for this initiative?

We are unable to release the name of the primary point of contact during the solicitation phase. Upon award of the contract, this name will be released.

5. What resources is the Arts Council committing to the planning process? Consultant office space? Administrative assistance? In-house meeting coordinator? Meeting venue? Meeting equipment (projector, internet, computer)?

The Arts Council has meeting space that it will make available. It is unable to make equipment or office space available due to state regulations. Administrative support will be minimal.

6. What is the budget appropriated for this project?

Please see answer #2

7. How many members are in the Arts Council?

The Council is made of 15 Governor-appointed members.

8. Who will be the designated Project Manager for this effort on behalf of the Oklahoma Arts Council?

Please see answer #4

9. Our organization firmly believes in the principle of "engagement" and would guide the subject matter experts in the creation of a strategic plan. RSI would not write the plan, but would steward the writing of the plan. Does this approach fit with your requirements?

We would have to have more specifics in the response to the RFP in order to evaluate this.

10. Will there be a Strategic Planning Project Team that the consultant will be working with a regular basis? If so, what will its makeup be?

At this time it is anticipated that the consultant will interface with an agency point of contact rather than a team. However, we are open to entertaining the idea of using a team.

11. Approximately how many constituents are referred to in Item C.7.1 (Conduct Survey and Focus Groups of Constituents)?

There are approximately 300 nonprofit and government entities that receive Council grants, plus artists on teaching artist and performing artist rosters.

12. Item C.7.2 to C.7.4 relates to Mission, Vision (review and revise as needed), Values (Develop). A critical requirement to determine cost of the strategic planning process is the existence of clear and shared agreement on these three aspects of an organization. What is the status on these elements relative to the potential requirement to revise them?

Mission and vision are generally agreed upon. Values and behaviors will need to be developed.

Description of Amendment - continuing

13. Item C.9 indicates that the environmental scan will have been completed prior to the commencement of the scope of work referenced in this RFP. Who will be doing that work? And what is their relationship to the Arts Council?

We are unable to release the name of the current consultant. It is someone who is very familiar with the Council and with Oklahoma.

14. What collaboration tool(s) are available to the Arts Council (e.g. email, Arts Council intranet, mobile technology for field workers, etc)?

The Arts Council is unable to make electronic tools available since it is a state agency.

15. What survey tools are commonly used by the Arts Council?

The Council doesn't have commonly used survey tools.

16. What exposure does your leadership team (or responsible planning team) have to strategic and tactical planning?

Our leadership team has extensive experience with strategic and tactical planning.

17. The solicitation indicates August 31, 2014 as a due date for the Strategic Plan. When does the Arts Council anticipate beginning this project? And would you be willing to adjust the start and due dates to allow for a minimum of 6 months project time?

The Arts Council anticipates starting the project March 1, 2014. We would be willing to adjust the dates, if necessary, to allow for six months of project time.

18. Section E.2 indicates a requirement for results of prior planning results. It would be a violation of my agreement with my clients to release work that I have done for them. What are alternative ways to meet your objectives with this requirement?

Familiarity with Oklahoma is a plus, although not required. This can be demonstrated in narrative form rather than releasing specific work products.

19. There is a requirement that the vendor be conversant with the State of Oklahoma. What is the best resource to provide the type of information that would help someone meet this requirement?

Personal testimony to this effect is acceptable, as are references.

20. Are you open to remote meetings: go-to-meeting, Skype, etc.?

Yes.

21. What is the Arts Council's experience with focus groups, i.e., how easy or difficult is it to convene them?

We anticipate that it will be relatively easy to convene focus groups.

Description of Amendment - continuing

22. Are you open to having a team of subject matter experts serve as the strategy team throughout the project? This team could have ad hoc or permanent community members on it.

Yes, we would be open to this.

23. Are you open to having an online strategic-plan-execution management, tracking, and communication tool at an annual fee?

This doesn't sound like an option we would be interested in; however, we would have to have more information.

24. Would you provide an administrative person for documenting meetings?

No.

25. Are you open to organization assessments that could include a focus group of community members as well as the Arts Council members?

Yes.

26. Would you pay for travel to and from the site for over 50 miles away?

Travel should be built into your overall fee.

27. Item H.2 indicates a firm fixed price and item H.3 indicates all payments are to be made in arrears. Does this mean that the vendor would not be paid in full until the delivery of the strategic plan or would the vendor be paid upon completion of milestones along the way?

The vendor could be paid upon completion of milestones along the way. The vendor should indicate their proposed payment timeline in their response to the RFP.

28. RE Item D.1, Can you provide any information on a scoring mechanism or the relative weighting/importance of items D.1.1. through D.1.7?

We are unable to provide additional information pertaining to the scoring mechanism.

29. In order to have an on-time delivery of a fixed-price product/service, it is essential that the client side of the equation keep important commitments. What is the recourse for the vendor if significant commitments on the part of the client are broken and significantly impact the desired results? For example, cancelling a meeting that is a lynch pin for other deliverables, not showing up to a meeting, not completing promised tasks.

The RFP response should indicate the commitments required on the part of the Arts Council.

30. Do you have any expectation on specific team roles you want the winning firm to provide? For example, do you need project management resources to help design and manage the action plans, etc.?

We do not need resources for designing or managing the action plans.

Description of Amendment - continuing

31. What data were collected or are being collected for the environmental scan? How are/were the data collected?

The phase 1 environment scan is meant to gather information from stakeholders about the internal and external issues and activities that affects OAC's operation, grants and services and is based on observations and indicators from the field.

32. Instructions to Oklahoma state agencies regarding strategic planning outline an "Eight Element Situation Analysis" as a basis for agency strategic planning (economy, social/demographic, government and regulatory, competition, technology, markets/customers, industry trends and best practices, and factors of production and internal environment). Will the environmental scan and SWOT to be provided to the vendor cover these topics?

Yes.

33. How is the SWOT analysis being developed?

The SWOT analysis is being developed through a series of interviews and listening sessions with constituents, staff, Council members, former Council members and government leaders.

34. The last Arts Council planning process involved 300 personal interviews and 72 focus groups in 25 communities, as well as a survey process that was conducted both online and at various events around the state. Based on the description in the plan, this consultation was conducted by staff. What is the expectation of level of staff activity in the planning process? Does the Arts Council envisage a similarly extensive consultation process to be managed or conducted by the consultants, or are the consultants mainly expected to facilitate internal analysis and discussions based on information already gathered in the pre-planning phase? This has significant implications for timeline, scope, and price.

The previous planning process was done by a full time staff member. It is not expected that this planning process will be this extensive; however, the extent of the process proposed will be weighed when evaluating proposals. There will be at least one staff member devoting time on a part time basis.

35. Is there a range within which the proposal should be priced?

Please see answer #2.

36. Have there been any assessments to date of the current strategic plan and its implementation? If so, are they available for review?

There have been no assessments to date of the plan; however, one will be done prior to the awarding of the contract.

37. Who will be the staff planning liaison to the consultants? Is there a Council Strategic Planning Committee?

We are unable to provide a name of the planning liaison to the consultants during the solicitation process. At this time there is not a Council strategic planning committee.

38. On page 14 of the solicitation package, section C.7. under Planning Process Requirements, C.7.4 you list "Develop Values and Behaviors". Would you be so kind as to provide some description regarding what outcome or deliverable is anticipated as a result of doing this task?

By values and behaviors we anticipate values such as accountability, integrity, etc. Behaviors would indicate how these values will be implemented.

Description of Amendment - continuing

39. #3 states "five-year strategic plan for the period beginning July 1, 2014." Paragraph C.4.1 states "five-year plan for the period beginning July 1, 2015." Please clarify.

This will be for the period beginning July 1, 2015.

40. Bids are due Feb. 12, 2014 at 3:00 pm. The final submission of the plan is to conclude on August 31, 2014. When will the planning process begin?

See question #17.

41. Is the facilitator needed for each step in the planning process as outlined in paragraph C.7?

Consultant involvement is expected for each step in the planning process.

42. What weighting is placed on each "best value criteria" in paragraph D.1 in rating the bidders?

Please see answer #28.

43. Will a bidder who does not meet the criterion "state arts planning experience" even be considered? Or should they not submit a bid, despite what other value they may bring?

Bidders without state arts planning experience will be considered.

44. How will the decision be made to accept a bid, e.g., What is the process? Who is involved? How are the best value criterion actually used? What are the most likely ways to be disqualified?

A committee will evaluate the bidders and decide the winning bid. We are unable to release additional information regarding this process.

45. What is the budget for this planning exercise for the outside facilitation? If the present budget may not be revealed to bidders in advance, what was the amount spent on outside facilitation in the last 5-year strategic planning process for FY09-FY14?

The last plan was done by a full time staff member.

46. What is the minimum that OAC reasonably expects to pay and what is the maximum for the outside facilitator?

See answer #2.

47. Who facilitated the last 5-yr. planning process, and are they on the invited bid list?

The person that facilitated the last planning process was a staff member who is not on the invited bid list.

48. Shall the cost of printed materials and copies be included in the bid or shall that cost be borne by the Oklahoma Arts Council directly?

The cost of printed copies of the strategic plan will be covered by the Oklahoma Arts Council. Other printing costs shall be borne by the vendor.

Description of Amendment - continuing

49. What value does the Oklahoma Arts Council hope to buy that they don't have internally already? For instance, someone who has a deep history in Oklahoma Arts who may guide the strategic thinking because of what they bring to the table? Or is it someone who brings a planning process that interests the OAC? Or is it an outsider's perspective – a fresh perspective – that they seek? Or something else perhaps?

We are looking for someone who brings a fresh perspective and someone who will involve a broad constituency base. Familiarity with Oklahoma is a plus.

50. May we talk to the decision-makers prior to submitting a bid in order to clarify their thinking on what they want and what they seek?

This is not allowed during the solicitation process.

51. What amount of time commitment can the outside facilitator expect from the Council and the staff to support and participate in this effort? Is there any constraint the bidder should be aware of in the level of participation and collaboration from the Council and the staff, such as the number of meetings or available time in meetings?

Staff leadership, particularly the agency point of contact, will devote a significant amount of time to this effort.

52. Are there any constraints or assumptions the bidders should be aware of in order to factor in their proposal?

No.

53. Who leads the effort? Is the Council chair or the Executive Director or the outside facilitator?

The outside facilitator will be leading the effort with direction, guidance and support from the agency point of contact.

54. An extensive planning process is described in the FY09-FY14 plan – over a year in the process, 300 interviews, 450 surveys, 25 community visits, etc. Is this planning exercise expected to resemble this process? How is it expected to be the same and how is it expected to be different?

Because the last planning process was done by a full time staff member, it is not expected that this process will be as extensive. If a consultant proposes a more efficient way of getting the same level of participation, that would be looked on favorably.

b. All other terms and conditions remain unchanged.

Supplier Company Name (**PRINT**)

Date

Authorized Representative Name (**PRINT**)

Title

Authorized Representative Signature