AI DEVELOPMENT FOR GRADUATE MEDICAL EDUCATION
RFP
OSUTUL-RFP-001864-2027

TABLE OF CONTENTS

		Page
1	INTRODUCTION / BACKGROUND	2
2	PURPOSE / OBJECTIVE	2
3	BIDDING INSTRUCTIONS	3
4	TERMS AND CONDITIONS	6
5	BID INQUIRIES / BUYER OF RECORD	6
6	SPECIAL PROVISIONS	7
7	AUTHORIZED USERS	7
8	PRE-AWARD PRESENTATION / DEMONSTRATIONS	8
9	SCOPE OF WORK / SPECIFICATIONS	8
10	SCHEDULE & TIMING	15
11	COST PROPOSAL	15
12	RISK ASSESSMENT AND MITIGATION	15
13	EXPERIENCE / QUALIFICATIONS / REFERENCES	15
14	BID SUBMISSION	16
15	METHOD OF AWARD / EVALUATION / NEGOTIATIONS	16
16	EVALUATION CRITERIA	17

1) INTRODUCTION / BACKGROUND

Oklahoma State University Center for Health Sciences advances the land-grant mission through a focused commitment to improving health outcomes across Oklahoma and beyond. Established in 1997 and located in Tulsa, OSU-CHS prepares the next generation of osteopathic physicians, scientists and health professionals to serve communities with the greatest need. Guided by the Cowboy Code, the center emphasizes service, integrity and a responsibility to improve lives through education, research and patient care.

OSU-CHS offers graduate and professional programs in areas including osteopathic medicine, athletic training, biomedical sciences, forensic sciences, health care administration and physician assistant studies. With small class sizes and a strong emphasis on hands-on learning, students benefit from personalized instruction, clinical training and research opportunities that prepare them for real-world impact. Flexible course delivery, including in-person, online and hybrid options, supports a diverse student population.

Nationally recognized for its impact, U.S. News and World Report ranked OSU-CHS No. 1 nationwide for placing graduates in Health Professional Shortage Areas. This distinction reflects a deep commitment to addressing physician shortages and improving access to care, particularly in rural and underserved communities. Research and outreach efforts are supported through centers of excellence focused on rural health, health systems innovation, Indigenous health and childhood adversity, among others.

The campus is home to one of the region's largest Clinical Skills and Simulation Centers, providing advanced, multidisciplinary training in patient care. OSU-CHS also operates OSU Medicine, a network of primary and specialty care clinics that deliver high-quality care while serving as training sites for students and residents.

OSU-CHS is a key partner in the development of Tulsa's Academic Medical District, a transformational investment that will expand clinical care, research and education. Anchored by OSU Medical Center, the district includes new and expanded facilities that will enhance patient care and strengthen workforce development. OSU Medical Center, the teaching hospital for OSU-CHS, is the only hospital in downtown Tulsa and is undergoing a major expansion to further elevate care and training.

In partnership with the Cherokee Nation, OSU-CHS also helped establish the nation's only tribally affiliated medical school in Tahlequah, reinforcing its leadership in culturally responsive care and education. Through innovation, collaboration and a clear focus on community impact, OSU-CHS is shaping the future of health care in Oklahoma and the region.

2) PURPOSE / OBJECTIVE

The Department of Graduate Medical Education (GME) at Oklahoma State University Center for Health Sciences (OSU-CHS) is seeking professional services to design, develop, and implement a foundational resident data management system that will serve as a centralized platform for managing resident information currently maintained across multiple spreadsheets and ancillary systems. We estimate that 80-100 users would need access to the system.

3) BIDDING INSTRUCTIONS

1. GENERAL INSTRUCTIONS.

A. Solicitation Publication: All documents relating to this solicitation shall be made publicly available on the Office of Central Procurement (OCP) bid site.

B. Solicitation Cancellations: The University reserves the right to cancel, withdraw, or not award any solicitation at any time without liability or prior notice.

C. Communications: All communications, clarifications, addenda, questions, responses, or any other matter relating to the solicitation must be made only through the public bid website. No contact regarding this solicitation with other University party is permitted and may be grounds to disqualify a bidder or reject a bid.

D. Bids Submitted at Bidder's Cost: (a) Bidders are solely responsible for any cost, expense, or fees incurred in preparing bids or otherwise responding to this solicitation. Bidders shall not seek to recoup or recover such costs at any time or through any means. (b) Bidders understand and agree that they cannot make any claim and do not have any right to recover damages, costs, or other expenses of any kind resulting from participation in this solicitation.

E. Open Records Act: Disclosure of bid materials will follow the University's Standard Terms and Conditions and applicable Open Records laws. Standard terms and conditions can be found under the "prerequisites" section of the online bid.

F. Pre-Bid Conference: The University may, at its discretion, conduct one or more pre-bid conference relating to the solicitation for purposes of clarifying its requirements. Nothing stated at the pre-bid conference shall change the solicitation unless such changes are reflected in an addendum issued by the University and published on the public bid website.

G. Pre-Bid Questions: All prospective bidders may submit pre-bid questions via the public bid website before the pre-bid question deadline. Pre-bid questions must be submitted as individual questions. Answers to the pre-bid questions will be made available on the public bid website and will be available to all bidders at the same time.

H. Addenda: No alteration to the solicitation will be made without an addendum. The University may amend a solicitation at any time before it closes by posting an addendum on the public bid website.

I. Bidder's Responsibility: (a) Bidders are responsible for periodically checking the public bid website until the solicitation closes to obtain any addenda, answers to pre-bid questions, clarifications, or other information relating to the solicitation. The University is not responsible for a bidder's failure to acquire any of the foregoing if made available on the public bid website. (b) Bidders are advised to rely only upon the contents of this solicitation and any written addenda issued by the University on the Website. In no event should bidders rely on any oral instruction. (c) If a bidder fails to notify the University of any ambiguity, conflict, discrepancy, omission, or other error in the solicitation that is known to the bidder or reasonably should be known to the bidder, the bidder accepts the risk of submitting its bid and, if awarded a contract, shall not be entitled to additional compensation, relief, or time because of the error or its later correction. (d) Bidders may request an administrative review of specifications if it is perceived that specifications were unfairly written to give preference to any supplier. If administrative review is requested, the bidder shall include information providing evidence of specification language that inhibits free and open competition.

Information will be submitted to the buyer whose name is listed in section 6 (Bid Inquiries – RFP contact).

J. Bidder Protests: The University's bidder protest policy can be found at 2020.08.11.supplierguidelines.osu-a-and-m-systems.pdf.

2. QUALIFICATIONS, SPECIFICATIONS, AND PRICING.

A. Qualifications: The University may establish minimum bidder qualifications, including but not limited to work history, past experiences, years in business, and annual revenue.

B. Scope of Work: (a) The scope of work sets forth needs, objectives, and schedules, and describes projects, requirements, specifications, types of goods or services, budgets, payment structures, milestones, responsibilities, or other necessary information. Each bidder's response should address the foregoing and how the bidder can meet the University's needs or objectives. (b) Unless otherwise specified in the scope of work (sole brand specifications): (i) manufacturer's names, brand names, information, or catalog numbers listed are for informational purposes only and are not intended to limit competition; and (ii) a bidder may offer any item which demonstrably meets or exceeds the designated specifications. Bidders shall offer new items of current design and technology unless the Scope of Work specifies that older models or versions, or that used, reconditioned, or remanufactured products are acceptable.

C. Fixed Price: Bidders should submit a fixed price for the term where feasible, including optional renewal terms. Bidders guarantee unit prices to be correct.

D. Travel expenses, if applicable, must be included in the total bid price.

E. Taxes: (a) As a constitutional entity of the State of Oklahoma, the University is exempt from sales, use, and excise taxes imposed by the State of Oklahoma and federal excise taxes pursuant to Title 26 of the United States Code. The University will provide a tax-exempt certificate upon request. (b) The University will only be responsible for taxes, duties, fees, levies, premiums, or other charges imposed by any governmental authority directly upon the University. All pricing hereunder must be exclusive of such taxes.

3. MODIFICATIONS, MISTAKES, AND WITHDRAWALS.

A. Modifications and Withdrawals: A bidder may modify or withdraw a bid via the website at any time before the close date.

B. Mistakes and Corrections: No correction may be made to a bid after the close date. The University presumes that all bids are correct. However, if a bidder or the University discovers a mistake in the bid or believes a mistake exists, either may request, in writing, that the bid be verified or corrected. Bidders must raise any mistake with the University contact in writing no later than five (5) days after the close date.

- Minor Informalities - Mistakes in form, non-substantive errors evident from the Bid documents, or insignificant mistakes that can be waived or corrected without prejudice to other Bidders (i.e., the effect on the price, quantity, quality, delivery, or contractual conditions is negligible) are permitted.
- Mistake Clearly Evident - If the mistake and the intended correct bid are clearly evident on the face of the bid document, the bid shall be corrected to the intended correct bid and may not be withdrawn. These mistakes include

typographical errors, errors in extending unit prices, transposition errors, and arithmetical errors.

- Mistake Not Clearly Evident - A bidder may request to correct a mistake or withdraw a low bid if: the mistake is clearly evident on the face of the Bid document, but the intended correction is not similarly evident, or the Bidder submits sufficient proof that clearly and convincingly demonstrates that a mistake was made.

C. Determination: When a bid is corrected or withdrawn, or a correction or withdrawal is denied, the Associate Vice President of Procurement (or designee) shall prepare a written determination showing that the relief was granted or denied and the bases for the determination.

4. RESPONSIVE BIDS.

A. Only Responsive Bids Considered: The University only considers responsive bids for evaluation. A bidder's request to modify or correct a non-responsive bid shall be governed by this section.

B. Non-Responsive Bids: The University reserves the right to reject a bid as non-responsive if the bid does not conform in all material respects to the solicitation.

C. Bid Rejection: The University reserves the right to reject one or all bids, accept or reject any bid in part, and to waive any minor informality or irregularity in any bid if the University determines that doing so is in the best interest of the University.

5. BID OPENING AND EVALUATION.

A. Bid Opening: There will be no physical bid openings. A public bid opening will disclose the name of each bidder, and no further information and will be conducted on a per request basis via electronic means provided the buyer identified in section 6 receives a written request no later than forty-eight (48) hours before the close date.

B. Evaluation Criteria: Bids will be evaluated in accordance with the evaluation criteria set forth in the solicitation. A bidder's past performance may be considered when evaluating a bid regardless of whether such is identified as evaluation criteria. The University reserves the right to require demonstrations, clarifications, and additional documentation from any or all responding bidders. Each bidder should be prepared to participate in oral presentations and demonstrations to define the bid, introduce the bidder's team proposed to work on the resulting contract, and respond to questions regarding the bid before an award.

6. CONTRACT AWARD.

A. More than One Award: The University may award a Contract to more than one bidder by awarding the Contract(s) by item or groups of items or may award the Contract(s) on an all or none basis, whichever is deemed to be in the best interest of the University.

B. Notice: Notice of award shall be provided upon request of any bidder or the bid tab made available through the open request process for other interested parties.

C. Bidders and Contractors must be registered as approved vendors to receive an award and/or payment from the Systems. The vendor registration process can be completed electronically through The Office of Central Procurement website at the following link: http://purchasing.okstate.edu.

4) TERMS AND CONDITIONS

By submitting a bid, each bidder understands and agrees that any contract resulting from this solicitation ("Contract" or "Order") is governed by University's Standard terms and conditions in effect as of the date the solicitation was posted, found in the "Prerequisites" section of the online solicitation. If any inconsistency arises, the University Standard Terms and Conditions control.

APPLICABLE TERMS, EXCEPTIONS, ORDER OF PRECEDENCE.

A. **Order of Precedence:** Contracts resulting from this solicitation shall follow the order of precedence stated in the University's Standard Terms and Conditions that is included in the "prerequisites" section of the online bid.

B. **Exceptions:**
   i. The General Terms and Conditions cannot be modified unless you submit with your bid the Terms and Conditions document with revisions made in line and changes tracked, in which case the version that is finally negotiated and executed by both parties shall apply.
   ii. Exceptions to the Scope of Work must be conspicuously identified in a cover page submitted with the bid.
   iii. Bidders may not incorporate terms by reference into the General Terms or Scope of Work.
   iv. The University has no responsibility to independently review an entire bid for exceptions. Any deviation from the General Terms or Scope of Work will be deemed void and not part of any resulting contract unless made in accordance with this section.
   v. A clarification or question is not an exception and will be disregarded when submitted with a bid.

5) BID INQUIRIES / BUYER OF RECORD

All questions regarding the solicitation and evaluation process should be directed to the buyer of record:

Buyer of Record:

Teresa Sherrill
Procurement Coordinator
OSU Center for Health Sciences
1111 W. 17th St.
Tulsa, OK 74107
918-561-1510
teresa.sherrill@okstate.edu

Questions directly related to the specifications should be submitted using the "Q&A Board" on the online solicitation. Questions must be submitted prior to the pre-bid question deadline. Bidders are encouraged to continuously monitor the Q&A Board for all questions and answers related to this solicitation. Any attempt to contact any end user or department other than The Office of Central Procurement during the solicitation and evaluation process may result in the disqualification of your bid.

6) SPECIAL PROVISIONS

A. The scope of this solicitation is for the one-time development and implementation of the platform. As a value-added service, bidders may also include information and pricing for optional post-implementation maintenance and support services.

7) AUTHORIZED USERS

A. As authorized by Oklahoma law, it is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. In the event a contract between the University and bidder(s) results from this RFP, the bidder (supplier) may offer the same prices, terms, conditions, and all other particulars herein to all other public institutions within the State of Oklahoma. As a result, in submitting a proposal, bidder(s) should consider proposing a pricing model and other commercial terms that take into account the higher volumes and other expanded opportunities that could result from the eventual inclusion of other institutions in the purchase contemplated by this RFP.
B. Bidders should be aware that if other Oklahoma public entities ("Participating Entities") elect to utilize the contract(s) awarded as a result of this solicitation they may have different administrative or delivery requirements. It will be the responsibility of each Participating Entity to negotiate specific clauses as between the bidder (supplier) and the Participating Entity.
C. If authorized by the supplier, the resulting contract may be extended to public entities to purchase at contract prices in accordance with contract terms. The supplier shall notify the Office of Central Procurement ("OCP") in writing of any such entities accessing the contract.
D. The supplier will provide annual usage reports for all entities accessing the contract. Participating Entities shall place their own orders directly with the supplier and shall fully and independently administer use of the contract to include contractual disputes, invoicing and payments without direct administration from OCP.
E. The University will not be a party to any contract between any other Participating Entity and the supplier and will not be held liable for any costs or damages incurred with respect to any other Participating Entity as a result of any authorization by the supplier to utilize the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any other Participating Entity and will not be considered in default of any such contract no matter the circumstances.
F. Use of this contract does not preclude any Participating Entity from using other contracts or competitive processes as they determine necessary.

8) PRE-AWARD PRESENTATION / DEMONSTRATIONS

A. The Office of Central Procurement (OCP) reserves the right to request demonstrations or product samples from any or all-responding Bidders. As part of the evaluation process presentations may be required from the highest ranked respondents. During these presentations, providers may be asked to provide additional data including product demonstrations.
B. If the University requires such a presentation, the buyer of record (listed in section 6 above) will schedule the time and place of such an event. Each firm should be prepared to discuss and substantiate any of the areas of the proposal.

9) SCOPE OF WORK / SPECIFICATIONS

SUMMARY:

At present, resident data is tracked and managed through a series of spreadsheet, using ancillary systems and manual processes. While these methods have met the department's basic needs, they are labor-intensive, difficult to maintain, and increasingly unsustainable as the GME program continues to grow. Reliance on spreadsheets creates challenges related to data accuracy, consistency, accessibility, reporting, version control, and long-term record management. Additionally, the current process increases the risk of duplicate data, manual entry errors, limited visibility into resident information, and inefficiencies associated with maintaining records across multiple sources.

To address these challenges, GME seeks to engage a professional services partner to develop a secure, scalable, and user-friendly solution that consolidates resident data into a centralized system. The proposed solution should support standardized data management practices, improve reporting capabilities, enhance accessibility for authorized users, and provide a sustainable framework for future growth and evolving compliance requirements.

The system should be designed with long-term maintainability in mind. Upon completion of the project, ownership of the application, associated documentation, and supporting infrastructure should be transferred to OSU-CHS. In partnership with OSU-CHS Information Technology, the selected vendor should provide comprehensive knowledge transfer, documentation, and administrator training to enable ongoing maintenance and support without requiring advanced software development or programming expertise. Additionally, OSU-CHS would like the option to evaluate and establish an ongoing support, and maintenance agreement should it determine that continued vendor support is beneficial.

Proposed infrastructure design for this system should be included in the proposal. OSU-CHS prefers a cloud-hosted solution that aligns with modern security and infrastructure standards. The solution should support Single Sign-On (SSO) integration

with OSU-CHS identity management systems and include the ability to provision and manage external users natively, allowing appropriate access for individuals who may not possess OSU-CHS credentials.

1. MANDATORY REQUIREMENTS

a. Resident and Program Data Management

i. Program performance dashboard

1. Track 3-year board pass rates.
2. Track duty hour compliance.
3. Track heightened monitoring and Special Review status.

ii. Resident concern tracking

1. Track residents on non-reviewable concern.
2. Track residents on reviewable concern.
3. Allow updates throughout the concern tracking process as they occur.
4. Generate institutional reporting related to resident concern tracking.

b. Recruitment and Match Tracking

i. Residency and fellowship recruitment repository

1. Track applicant rankings across programs.
2. Track Match outcomes across programs.
3. Track OSU student Match rates.
4. Track matched applicant demographics, including DO, MD, FMG, and hometowns.

ii. Historical recruitment analytics

1. Compare ranking trends across multiple years.
2. Compare Match trends across multiple years.
3. Generate institutional recruitment and Match reports.

c. Accreditation and Review Management

i. Special Review workflow management

1. Track Special Reviews.
2. Track action items.
3. Track deadlines.
4. Track status updates.
5. Store supporting documentation.
6. Track institutional follow-up activities.

ii. Annual Program Evaluation management module

1. Allow programs to upload Annual Program Evaluations.
2. Allow programs to upload supporting documents.
3. Provide institutional reporting for Annual Program Evaluations.

iii. System integration

1. Integrate with New Innovations.

d. Residency Program Health tracking

i. Track accreditation and monitor compliance

ii. Track overall trainee health and outcomes

iii. Ability to track and monitor residency program operations
iv. Ability to track recruitment and match tracking
v. Ability to track and monitor faculty and leadership tenure, turnover, etc.
vi. Ability to track growth opportunities.

e. Reporting and Analytics

i. Institutional reporting platform

1. Generate annual institutional reports.
2. Generate board pass rate analyses.
3. Generate graduate outcome reports.
4. Generate scholarly activity reports.
5. Generate accreditation metric reports.
6. Generate residency program health reports.
7. Generate trainee outcomes reports
8. Generate faculty and workforce reports
9. Generate growth opportunities reports
10. Generate institutional risk reports.

ii. Graduate outcomes repository

1. Maintain graduate outcomes data.
2. Generate trend analyses.
3. Generate percentage-based outcomes reports.

2. DESIRED FEATURES

a. Advanced Reporting and Analytics Enhancements

i. Dashboard filtering and drill-down capabilities

1. Filter dashboards by program, academic year, and reporting category.
2. Drill down from institutional summaries to program-level details.

ii. Trend reporting

1. Display multi-year comparisons for board pass rates, Match outcomes, scholarly activity, and graduate outcomes.
2. Export reports for institutional review, leadership review, and accreditation documentation.

b. Workflow and Notification Enhancements

i. Task and deadline notifications

1. Notify assigned users of upcoming deadlines for Special Reviews, Annual Program Evaluations, and follow-up items.
2. Provide status visibility for outstanding action items.

ii. Documentation management

1. Maintain a centralized location for supporting documentation tied to reviews, evaluations, and reports.
2. Support document upload and retrieval by authorized users.

3. TECHNICAL REQUIREMENTS

a. Architecture and Hosting

i. The proposed solution should be cloud-hosted within the United States. If the vendor does not provide hosting services, the vendor shall submit a proposed infrastructure architecture and collaborate with OSU-CHS IT to identify a hosting solution that satisfies these requirements. Non-cloud-hosted solutions may be proposed but are subject to OSU-CHS approval.

ii. Solution architecture must be scalable and capable of supporting future growth, additional residency programs, and expanded functionality.

iii. The application must support high availability and redundancy to minimize service interruptions.

iv. Vendor shall provide details regarding hosting environment, infrastructure architecture, and disaster recovery capabilities.

b. System Ownership and Portability

i. Upon project completion, OSU-CHS shall retain ownership of all resident data and associated records.

ii. Vendor shall provide a complete export capability for all data in standard, non-proprietary formats (e.g., CSV, XML, JSON, SQL).

iii. OSU-CHS must be able to retrieve all organizational data upon request and upon termination of services.

iv. Vendor must disclose any proprietary components that may impact future migration.

c. Integration Requirements

i. Solution must support Single Sign-On (SSO) integration using industry-standard protocols, including SAML 2.0, and/or OAuth 2.0.

ii. Solution must support integration with Microsoft Entra ID (Azure Active Directory) or equivalent identity providers.

iii. Solution should provide APIs or web services for future integration with institutional systems.

iv. APIs should be REST-based and documented.

d. User Management

i. Support role-based security with configurable permissions.

ii. Support internal OSU-CHS users through SSO.

iii. Support native external user account creation and management.

iv. Allow delegated administration by designated GME staff.

v. Support account provisioning and deprovisioning processes.

e. Reporting and Analytics

i. Provide configurable reports and dashboards.

ii. Support exporting reports to Excel, CSV, and PDF formats.

iii. Maintain historical data and audit reporting.

iv. Support ad hoc reporting by authorized users without vendor intervention.

f. Training and Documentation

i. Vendor must provide complete system documentation.
ii. Vendor must provide administrator training for OSU-CHS IT and designated GME staff.
iii. Training materials shall include user guides, technical documentation, and system administration procedures.
iv. Documentation must be updated to reflect the implemented solution.

g. Requirements pertaining to AI Use in the platform (If AI will be used for the development and day to day use of the platform):

i. FERPA compliance if student information is involved
ii. Penetration testing before deployment
iii. Protection against prompt injection, data leakage, and unauthorized access
iv. No use of organizational data for training external AI models
v. AI model used
vi. Vendor must provide detailed information regarding model hosting
vii. Vendor must provide list of third parties involved
viii. Vendor must disclose all geographic locations where AI models and related data processing are located
ix. Users must identify when AI is being used
x. AI generated content must be identifiable
xi. Documentation regarding AI use in the platform must explain:
    - Inputs
    - Outputs
    - Limitations
    - Expected accuracy
xii. Human review is required for critical decisions
xiii. Clear escalation process when AI recommendations appear incorrect
xiv. Ability to override AI decisions
xv. **AI MUST NOT** make autonomous decisions in the platform

4. INFORMATION SECURITY REQUIREMENTS

a. Authentication and Access Control

i. Multi-factor authentication (MFA) must be supported for all administrative accounts.
ii. MFA should be supported for all user accounts.
iii. Access controls must follow the principle of least privilege.
iv. Administrative and user roles must be configurable and auditable.
v. Session timeout and account lockout controls must be configurable.

b. Data Encryption

i. All data must be encrypted in transit using TLS 1.2 or higher.
ii. All sensitive data must be encrypted at rest using industry-standard encryption methods.
iii. Encryption keys must be managed using industry best practices.

c. Audit Logging

i. System must maintain detailed audit logs.
ii. Audit logs shall capture:
    - User logins and logouts
    - Record creation, modification, and deletion
    - Permission changes
    - Administrative actions
iii. Audit logs shall be retained according to OSU-CHS retention requirements.
iv. Audit logs must be exportable for compliance and investigation purposes.

5. ADDITIONAL REQUIREMENTS SHOULD VENDOR BE RESPONSIBLE FOR MAINTENANCE AND SUPPORT AND HOSTING

a. Security Program

i. Vendor must maintain a formal information security program aligned with industry standards.
ii. Vendor must respond to OSU-CHS Security risk assessment questionnaire
iii. Vendor shall provide documentation of security policies and procedures upon request.
iv. Vendor shall identify a designated security officer or security contact.

b. Vulnerability Management

i. Vendor must maintain a documented vulnerability management program.
ii. Critical security vulnerabilities must be remediated promptly.
iii. Vendor shall perform regular vulnerability scanning and security testing.
iv. Vendor shall disclose any significant security findings impacting the solution.

c. Penetration Testing

i. Vendor shall conduct independent penetration testing at least annually.
ii. Summary results and remediation status must be made available upon request.
iii. Critical and high-risk findings must be remediated within defined timeframes.

d. FERPA and Educational Records

i. Solution must support compliance with FERPA requirements where applicable.
ii. Access to educational records must be restricted to authorized personnel.

e. Data Retention

i. Data retention and archival capabilities must be configurable.
ii. Vendor must document backup retention schedules and data destruction procedures.

6. BUSINESS CONTINUITY AND DISASTER RECOVERY

a. Backup Requirements

i. Automated backups must occur regularly.
ii. Backups must be encrypted.
iii. Vendor must provide backup retention schedules.

b. Disaster Recovery

i. Vendor must maintain documented disaster recovery procedures.
ii. Vendor shall provide Recovery Time Objective (RTO) and Recovery Point Objective (RPO) commitments.
iii. Vendor must test disaster recovery capabilities periodically.

c. Availability

i. Vendors should state their Service Level Agreement (SLA) for system availability.
ii. Preferred uptime target is 99.9% or greater.

7. VENDOR REQUIREMENTS

a. Experience

i. Vendor should demonstrate experience developing software preferably for higher education, academic medicine, healthcare, residency management, or graduate medical education solutions.
ii. Vendor shall provide references from organizations of similar size and complexity.

b. Support Services

i. Vendor shall provide support service options, including:
   - Help desk support
   - Incident management
   - Escalation procedures
   - Maintenance windows
   - Enhancement request process

c. Knowledge Transfer

i. Vendor must provide sufficient knowledge transfer to enable routine application administration by OSU-CHS personnel.
ii. Preference will be given to solutions that minimize the need for advanced software development expertise for ongoing maintenance.

d. Deliverables Required from Vendors

i. Vendors must include:
   1. Proposed architecture diagram.
   2. Project implementation approach and timeline.
   3. Security and compliance documentation.
   4. Training and knowledge transfer plan.
   5. Support and maintenance options.
   6. Disaster recovery and business continuity documentation (If vendor offers hosting/ maintenance/support agreement)
   7. References from similar implementation projects.
   8. Detailed licensing and cost structure.

9. Description of data ownership and data export capabilities.
10. Description of any third-party products, platforms, or services included in the proposed solution.

10) SCHEDULE & TIMING

To ensure successful implementation and training, all bids should be accompanied by a schedule for projected completion and final delivery. The schedule should be uploaded in the Supplier Attachments section of the bid and labeled "Project Schedule".

11) COST PROPOSAL

A. Bidder is to provide a detailed breakdown of the total cost for the proposed solution to include but not limited to licensing, implementation, training, maintenance, support, and any other related expenses for the solution offered. Include all aspects of providing the Scope of Work associated with this RFP. Include details regarding storage capacities and scalable price models, if applicable. If implementation includes segmentation by campus or department, include details and price models for this configuration.
B. The cost proposal shall contain the complete financial offer made to the University. Any additional expenses, not explicitly stated, will not be honored by the University.
C. The Cost Proposal should be uploaded in the Supplier Attachments section of the bid system and labeled "Cost Proposal."

12) RISK ASSESSMENT AND MITIGATION

Risk is a part of any business activity and service delivery. Suppliers who employ experts have less risk due to their experience and expertise. Expert Suppliers steer clear of the pitfalls, having been there and done that. Hiring an expert Supplier for each category will provide the best possible outcome to the University.
Suppliers should identify risks in providing the services and products specific to each category. Risks should be identified in a numbered list and each item should contain a mitigation plan or solution. Risk identification and mitigation will be part of the qualitative evaluation criteria. The best value Supplier will be given the comprehensive list of risks that were identified by all bidders and requested to submit a mitigation plan prior to contract award.

13) EXPERIENCE / QUALIFICATIONS / REFERENCES

A. Bidder should be able to demonstrate a history of competency and successful experience in providing these types of products/services to other institutions, preferably within higher education.
    a. Submit the last 3 projects of similar nature recently completed, including customer references (name and contact information) for each project, that will demonstrate your experience and competence.
B. Experience and references should be uploaded in the "Supplier Attachments" section of the e-bid system and labeled accordingly.

14) BID SUBMISSION

A. Submission of Bid: All bids must be submitted to the University via the online bid platform on or before the designated close date. Bids cannot be submitted via email, mail, facsimile, or in person. A bidder experiencing technical difficulties with the website should contact the individual designated as the University contact well in advance of the due date.
B. Bid Deadline: Any bids, modifications, or withdrawals received after the close date are deemed void.
C. Firm Bid: Unless otherwise specified in the scope of work, bids must be held firm in all respects for a period of one hundred twenty (120) days beyond the close date to allow time for evaluation, approval, and award.
D. Bid as a Legal Offer: Bidders must treat each submitted bid as a legal offer to form a contract which the University may accept by issuing an award letter.
E. Bidder should prepare a proposal that addresses each section requiring proposals;
    a. Special Provisions
    b. Scope of Work
    c. Risk Assessment and Mitigation

   Sections must be clearly numbered and in the order of the RFP. Please describe how your proposed solution meets or exceeds the University's needs as described in the Scope of Work.
F. The proposal should be uploaded to the to question 3.1 in the "Questions" section of the online solicitation.
G. Bidder must submit with its initial Bid any separate agreement or proposed contract complete with all terms and conditions with which it will require the Board and/or Institution to agree and comply. Failure to comply may forfeit the inclusion opportunity.

15) METHOD OF AWARD / EVALUATION / NEGOTIATION

A. Evaluation methodology - will be "Best Value". Only responsive bids will be considered. The University reserves the right to reject a bid as non-responsive if the bid does not conform in all material respects to the Solicitation.
B. Proposal Clarification – OCP reserves the right, at its sole discretion, to request clarifications of technical bids or to conduct discussions for the purpose of clarification with any or all bidders. The purpose of any such discussions shall be to ensure full understanding of the bid. If clarifications are made because of such discussion, the bidder(s) shall put such clarifications in writing. The clarification shall not alter or supplement the bid.
C. Competitive Negotiations - OCP reserves the right to negotiate with one, selected, all, or none of the bidders responding to this solicitation to obtain the best value. Negotiations could include discussions on products, services, pricing, contract terminology, or any other issue material to an award decision or that may mitigate institutional risks. OCP shall consider all issues negotiable and will not be artificially constrained by internal corporate policies. Negotiation may be with one or more bidders, for one or all items in the Bid. Bidders that contend that they lack flexibility because of their corporate policy on a negotiation item shall face a significant disadvantage and may not be considered.
D. Negotiations may be conducted in person, in writing, or by telephone. Negotiations shall only be conducted with potentially acceptable bids. OCP reserves the right to limit negotiations to those bids that received the highest rankings during the initial evaluation phase.

Terms, conditions, prices, methodology, or other features of the bid 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 to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the bid.

E. The requirements of this solicitation shall not be negotiable and shall remain unchanged unless the OCP Chief Procurement Officer determines that a change in such requirements is in the best interest of the University.

F. BEST and FINAL – OCP may request best and final bids if deemed necessary and shall determine the scope and subject of any best and final request. However, the bidder should not expect an opportunity to strengthen its bid and should submit its best bid based on the solicitation.

16) EVALUATION CRITERIA

A. COST EVALUATION

1. The average pricing of all bids will be utilized to determine a baseline and establish a competitive range. The cost component will be evaluated utilizing the competitive range. The top scoring bid, based on qualitative evaluation metrics, will be compared to the competitive range. If the bid price of the top scoring bid is within the competitive range or is justified with performance information, the award process continues to the highest qualitative score. If performance metrics, combined with pricing information, do not support an award, the evaluation process will continue to the next highest qualitative score.
2. Your bid should include all relevant information about your pricing proposal to justify the cost. Suppliers who do not show dominant information of performance, cost, time, etc. to prove their cost proposal is valid and justifiable are eliminated from consideration due to their pricing not being within the competitive range.

B. QUALITATIVE EVALUATION CRITERIA

1. Adherence to requested functionality
2. Past performance and references
3. Security, compliance, and risk
4. Training and support

END OF DOCUMENT