



# Purchase Order

Dispatch via Print

**Department of Education**  
STATE DEPARTMENT OF EDUCATION  
HODGE BUILDING  
2500 N LINCOLN BLVD  
OKLAHOMA CITY OK 731054599

<b>Purchase Order</b>	<b>Date</b>	<b>Revision</b>	<b>Page</b>
2659018044	06/20/2019		1
<b>Payment Terms</b>	<b>Freight Terms</b>		<b>Ship Via</b>
45 Days	Free on board at Destination		Common
<b>Buyer</b>	<b>Phone</b>		<b>Currency</b>
Richard Williams (090)	405/522-1040		USD

**Ship To:** STATE DEPARTMENT OF EDUCATION  
HODGE BUILDING  
2500 N LINCOLN BLVD  
OKLAHOMA CITY OK 731054599

**Bill To:** STATE DEPARTMENT OF EDUCATION  
HODGE BUILDING  
2500 N LINCOLN BLVD  
OKLAHOMA CITY OK 731054599

**Supplier:** 0000343574  
OKLAHOMA SCHOOLS ADVISORY COUNCIL  
2403 N 41ST ST E  
MUSKOGEE OK 74403-1889

**Tax Exempt?** Y    **Tax Exempt ID:** 736017987

Line-Sch	Cat CD / Item Id	Description	Quantity	UOM	PO Price	Extended Amt	Due Date
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1- 1	64131607 /	Paraprofessional RFP	1.0000	EA	11,440.0000	11,440.00	11/01/2018
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The intent of this Request for Proposal (RFP) is to select a qualified supplier who can provide in-person training to special education paraprofessionals. Paraprofessionals play important roles in improving student achievement in schools. They are responsible for reinforcing and augmenting a teacher's effort in the classroom. The Paraprofessionals not only provides key support to the teacher but especially to students with disabilities in the classroom who need instruction or assistance, in keeping with their Individualized Education Program (IEP). Paraprofessionals must receive twenty-four (24) hours of core training and an additional six (6) hours of training per year.

Federal Regulations: 34 CFR §300.156 (Personnel qualifications) and 34 CFR §300.704 (State-level activities)

**Total PO Amount**                      11,440.00

**COMMENTS:**

Contract Period:  
7/1/19 - 6/30/20 with option to renew for six (6) additional one (1) year periods at same terms and conditions.

Options to do 90 Day Extension(s)

Agency Contact:  
Todd Loftin  
405-522-3237  
Todd.loftin@sde.ok.gov

Vendor Contact:  
Kaylin Coody  
918-640-0787  
kcoody@osac.us

See Solicitation for additional terms and conditions

Authorized Signature

## **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 Central Purchasing Division 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 Central Purchasing Division 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 Central Purchasing Division.
- A.3.3. It is the bidder's responsibility to check the OMES/Central Purchasing Division website frequently for any possible amendments that may be issued. The Central Purchasing Division 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 Central Purchasing Division 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 Central Purchasing Division at 5005 N. Lincoln Blvd. Suite 300, Oklahoma City, Oklahoma, 73105 at the time and date specified in the solicitation as 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 Central Purchasing Division 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 Central Purchasing Division, 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 Equivalent**

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 Central Purchasing 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 Central Purchasing Division 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 Central Purchasing Division.

#### **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 Central Purchasing Division. 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 Central Purchasing Division and 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](http://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.



## **B. SPECIAL PROVISIONS**

### **B.1. Contract Period**

Date of Award through June 30, 2019, with option to renew for six (6) additional one (1) year periods at same terms and conditions.

### **B.2. 90 Day Extension**

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

### **B.3. Mandatory Vendor Registration for Contract Award (In Addition to Section A.15.3)**

**B.3.1.** Acquisitions issued by agencies under the authority of Title 74 require vendors to register with Central Purchasing prior to award. Vendors will not be required to register to submit a bid response but will be required to register prior to being awarded a contract and renew their registration prior to each renewal of an award.

**B.3.2.** Vendors pending contract award to a bid released by the Central Purchasing Division or other Oklahoma state agency MUST register with the state.

**Online Registration:** <https://www.ok.gov/dcs/vendors2/app/index.php>

**B.3.2.1.** Pursuant to 74 O.S. § 85.33.B: o A vendor may register with the Central Purchasing Division to be placed on the Supplier List for bid notification.

**B.3.2.2.** Registration entitles a supplier to receive all bid notices for the commodity classes specified by the vendor in the registration process for a period of one year.

**B.3.2.3.** The Vendor Registration fee is **\$25 for EACH** family code for which the vendor desires registration.

**B.3.2.4.** The following items describe information requested by the vendor registration application. To expedite the application process, vendors are encouraged to have the information readily available prior to beginning the registration application. If your company is not currently transacting business in the State of Oklahoma, you may not have some of the items listed. However, any vendor selected for award of a contract with the state of Oklahoma must meet the requirements prior to the issuance of a purchase order.

**B.3.2.5.** E-mail address - if possible, we encourage all vendors to create a central e-mail address, to which all state bidding e-mail correspondence can be sent. A central e-mail for your organization will assure personnel changes or employee absences do not inhibit your ability to receive timely notifications of State bidding opportunities.

**B.3.2.6.** An Oklahoma Sales Tax Permit Number and its Expiration Date or explanation of the exemption status (FAQs)

**B.3.2.7.** An Oklahoma Secretary of State Filing Number, or explanation of the exemption status (www.sos.ok.gov or 405-521-3911)

**B.3.2.8.** A Workers Compensation Insurance Certificate (PDF file) or explanation of the exemption status (FAQs)

**B.3.2.9.** Vendors must complete all 12 steps of the registration application, which require business information about your company, a substitute W-9 form and designation of the commodity codes/classifications your company is interested in. We recommend vendors search UNSPSC Website Code Posting to identify the applicable commodity codes prior to beginning the registration application. However, you will have the option to select and deselect a family, class and commodity during the online registration process before finalizing your application.

**B.3.2.10.** Payment information related to a bank checking account (example), or VISA, MasterCard or American Express credit card. All payments are made through an encrypted secure server and payment information is not stored after a transaction. You will receive confirmation after your registration is validated and approved by the Vendor Registration Officer.

**B.3.3.** Note to Vendors: The State of Oklahoma does NOT provide legal advice regarding exemptions from Sales Tax Permit, Secretary of State, and Workers Compensation Insurance registrations

### **B.4. Subcontracting**

The Oklahoma State Department of Education (OSDE) shall contract with one (1) supplier for the total work to be accomplished under this contract. The supplier may not subcontract this work out.

## **B.5. Minor Deficiencies or Informalities**

- B.5.1.** "Minor deficiency" or "minor informality" means an immaterial defect in a bid or variation in a bid 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.
- B.5.2.** The State Purchasing Director may waive minor deficiencies or informalities in a bid if the State Purchasing Director determines the deficiencies or informalities do not prejudice the rights of other bidders, or are not a cause for bid rejection.

## **B.6. Hold Harmless**

Proposed Supplier agrees to hold harmless Oklahoma State Department of Education and its Trustees, officers, servants, employees, agents and consultants, against any claims, demands and liabilities resulting from any act or omission on the part of the Supplier and/or agents, subcontractors, servants, and employees thereof in the performance of this contract.

## **C. SOLICITATION SPECIFICATIONS**

### **C.1. Scope of the Service**

- C.1.1.** The State of Oklahoma Office of Management Enterprise Services Central Purchasing Division (OMES/CP) on behalf of the Oklahoma State Department of Education (OSDE) is accepting proposals from qualified Suppliers who can provide in-person training to special education paraprofessionals. Paraprofessionals play important roles in improving student achievement in schools. They are responsible for reinforcing and augmenting a teacher's effort in the classroom. The Paraprofessionals not only provide key support to the teacher but especially to students with disabilities in the classroom who need instruction or assistance, in keeping with their Individualized Education Program (IEP). Paraprofessionals must receive twenty-four (24) hours of core training and an additional six (6) hours of training per year.
- C.1.2.** The successful supplier will provide the core paraprofessional training twice per year, once in the Oklahoma City area and once in the Tulsa area.
- C.1.3.** The successful supplier will provide a detailed description for the core paraprofessional training, and must include:
  - C.1.3.1.** How the training will align to the existing OSDE Paraprofessional Training Curriculum
  - C.1.3.2.** A tentative schedule for both trainings.
  - C.1.3.3.** A tentative location for both trainings.
  - C.1.3.4.** How trainings will be advertised to potential participants.
- C.1.4.** The successful supplier will outline and provide a description of training that will satisfy the additional six (6) hour training requirement for paraprofessionals. The training must be provided twice per year, once in the Oklahoma City area and once in the Tulsa area. The outline must include:
  - C.1.4.1.** Topics for the training with an emphasis on classroom management and instructional strategies.
  - C.1.4.2.** A tentative schedule for the trainings.
  - C.1.4.3.** A tentative location the trainings.
  - C.1.4.4.** How trainings will be advertised to potential participants.
- C.1.5.** The successful supplier will describe in detail plans for training documentation and training evaluation for both the core paraprofessional training and additional six (6) hours.

## D. EVALUATION

**D.1. Proposals will be evaluated on the “best value” determination in accordance with Title 74, §85. The best value criteria for this proposal is listed below and all proposals will be reviewed and awarded based on the following evaluation criteria:**

- D.1.1. Training Program Outlines
- D.1.2. Experience in this type of service
- D.1.3. Cost
- D.1.4. Resumes

## 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 five (5) electronic copies of their complete response on five (5) separate USB which includes 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 a USB drive/flash drive/thumb drive.
- 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.3. Suppliers must provide all required training materials.

### E.4. Proposal Response Format:

- E.4.1. Suppliers shall submit a written proposal that presents the supplier's qualification and understanding of the work to be performed. The proposal should provide all the information considered pertinent to the supplier's qualifications for this project.
- E.4.2. The supplier should include in their proposal the following:
  - E.4.2.1. Table of contents – All pages numbered
  - E.4.2.2. Introduction
  - E.4.2.3. Cover Letter – On company letterhead, signed by a person with the corporate authority to enter into contracts in the amount of the proposal.

### E.5. Executive Summary

Response to the Scope of Services – The supplier should address each section of the scope of services section of this document indicating compliance with or acceptance of the requirement and any additional explanation of their response. The supplier shall identify any exceptions, referenced to the paragraph number, in a subsection titled “Exceptions”.

**E.6. Company profile – Suppliers are to present a Company profile that shows the ability, capacity and skill of the supplier to perform the services required. Include supplier's experience (five (5) years minimum) with providing services of this scope, and number of years specializing in services of this type (five (5) years minimum).**

- E.6.1. Supplier must also submit a resume for all staff that will be assigned to this contract.

**E.7. Program description:**

**E.7.1.** Supplier will provide detailed cost proposal for each training.

**E.7.2.** The supplier will include all billing practices and any anticipated milestones that will require payments.

**E.8. Suppliers must submit resumes for everyone working on this project.**

**F. CHECKLIST**

**F.1. 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/requested documentation:**

**F.1.1.** \_\_\_\_\_ Responding Bidder Information Form CP-076

**F.1.2.** \_\_\_\_\_ Non-Collusion Certification Form CP-004

**F.1.3.** \_\_\_\_\_ All amendments signed (if applicable)

**F.1.4.** \_\_\_\_\_ Proof of Liability and Worker's Compensation Insurance

**F.1.5.** \_\_\_\_\_ OMES PAYEE/VENDOR Form (If not currently registered with the state)

**F.1.6.** \_\_\_\_\_ Mandatory Vendor Registration for Contract Award (In Addition to Section A.15.3) (Section B.3.)

**F.1.7.** \_\_\_\_\_ Pricing (Section H)

**F.1.8.** \_\_\_\_\_ Response to Section E

**G. OTHER**

**G.1. Questions**

All questions regarding this solicitation must be submitted in writing and are to be emailed no later than 3:00 PM CST/CDT on 1/29/19 to the OMES/Central Purchasing Division Buyer via emailed to – [Richard.Williams@omes.ok.gov](mailto:Richard.Williams@omes.ok.gov). Questions received after this date may not be answered. If any questions are received, an amendment to this solicitation will be posted on our website after this deadline listing all questions received and their answers. In addition, suppliers will be notified the amendment is on our website. Any communication regarding this RFP must be sent to the OMES/Central Purchasing Division Buyer listed above. Contacting any other agency personnel may result in your proposal being deemed as non-responsive. Please be sure to reference the RFP number when emailing questions

**H. PRICE AND COST**

**H.1. Payments against this contract shall be firm fixed at the quoted price, and OSDE shall not pay nor be liable for any other additional costs.**

**H.2. Payment for all services herein shall be made in arrears. OSDE shall not make any advance payments or advance deposits.**

**H.3. Supplier will invoice OSDE within forty-five (45) calendar days of the provision of services. The supplier will provide copies of daily sign-in sheets to support the request for payment. OSDE will have forty-five (45) days from presentation of a proper invoice to issue payment to the supplier.**

**H.4. Supplier must submit a complete breakdown on a budget sheet of all pricing attached to this RFP.**



# Amendment of Solicitation

Date of Issuance: 2/7/19

Solicitation No. 2650000356

Requisition No. 2650006583

Amendment No. 1

Hour and date specified for receipt of offers is changed:  No  Yes, to: \_\_\_\_\_ CST

Pursuant to OAC 260:115-7-30(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:**

5005 N Lincoln Blvd  
Ste 300

OKC, OK 73105 -  
or

**Personal or Common Carrier Delivery:**

5005 N Lincoln Blvd  
Ste 300

OKC, OK 73105 -

Richard Williams  
Contracting Officer

405 - 522 - 1040  
Phone Number

Richard.Williams@omes.ok.gov  
E-Mail Address

**Description of Amendment:**

a. This is to incorporate the following:

Below are the answers to all questions received:

Q1: Our company provides training regarding crisis prevention, primarily for education and health care facilities. Would this training be relevant to the above RFP?  
A1: No

Q2: Do you have a copy of the OSDE paraprofessional training curriculum please?  
A2: See the attached Special Education Paraprofessional Facilitator Guide.

Q3: Does the supplier require any state teacher certifications or the like in order to be considered?  
A3: No

Q4: Can you confirm that the vendor should offer two, 24-hour and two, 6-hour trainings during the initial contract period of award to June 30, 2019?  
A4: We will work with the selected supplier to make a final determination if the number of trainings should be adjusted.

Q5: How much time (if any) would OSDE like between the delivery of the 24 hours of training and the 6 hours of training?  
A5: We will work with the selected supplier to make that determination.

Q6: Page 13, section B.4 states that the supplier may not subcontract this work out. Does this mean that no portion of the work may be subcontracted even if it is a small portion of the work?

A6: Section B.4 is standard contract language for this agency's RFP's. For this RFP the OSDE will contract with one (1) Supplier. However, in this instance, the Supplier may subcontract a portion of the work specified in the RFP, but the Supplier must obtain the written consent and approval of OSDE. The terms of this contract and such additional terms as OSDE may require shall be included in any approved subcontract and any approval of any subcontract shall not relieve the supplier of any responsibility for performance under this contract.

All payments for products shall be made directly to the Supplier. No payments shall be made to the Supplier for any services performed pursuant to this Contract by unapproved or disapproved employees of the Supplier or a subcontractor

Q7: Is there an anticipated budget for this work?

A7: No budget information is available.

Q8: Is there a current vendor offering this training? If so, who is it?

A8: No

Q9: It appears that in the past, this course has been provided at a cost to students. Is the intention that the selected vendor continue to be able to charge for participation?

A9: The supplier will not be able to charge for the training. That's what we are paying for.

Q10: How does the training in this RFP relate to the current trainings offered for paraprofessionals through the Oklahoma CareerTech centers?

A10: It is the same training offered in a different format, hence the requirement of using the OSDE curriculum.

Q11: How many participants does OSDE expect the vendor to accommodate at each of the four training events? (Oklahoma City (24 Hour), Oklahoma City (6 Hour), Tulsa (24 Hour) and Tulsa (6 Hour)

A11: Up to 100.

b. All other terms and conditions remain unchanged.

\_\_\_\_\_  
Supplier Company Name (**PRINT**)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Representative Name (**PRINT**) Title

\_\_\_\_\_  
Authorized Representative Signature



## Responding Bidder Information

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

1. RE: Solicitation # 2650000356

2. Bidder General Information:

FEI / SSN: 73-1091436 Supplier ID: \_\_\_\_\_  
Company Name: Oklahoma Schools Advisory Council

3. Bidder Contact Information:

Address: 8403 N. 41<sup>st</sup> St. E.  
City: Muskogee State: OK Zip Code: 74403  
Contact Name: Raylin Coody  
Contact Title: Associate Director  
Phone #: (918) 640-0787 Fax #: (918) 887-9686  
Email: kecoody@osac.us Website: www.osac.us

4. Oklahoma Sales Tax Permit<sup>1</sup>:

- 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](http://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.<sup>2</sup>

<sup>1</sup> For frequently asked questions concerning Oklahoma Sales Tax Permit, see <https://www.ok.gov/tax/Businesses/index.html>

<sup>2</sup> 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.

*Kaylin Coody*

Authorized Signature

*2/12/19*

Date

*Kaylin Coody*

Printed Name

*Associate Director*

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: State Department of Education

Agency Number: 265

Solicitation or Purchase Order #: 2650000356

Supplier Legal Name: Oklahoma Schools Advisory Council

**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.

Kaylin Coody  
Supplier Authorized Signature

2/12/19  
Certified This Date

Kaylin Coody  
Printed Name

Associate Director  
Title

(918) 640-0787  
Phone Number

KCoody@OSAC.US  
Email

(866) 887-9686  
Fax Number

July 19, 2018

Oklahoma Schools Advisory Council  
2403 N 41st St E  
Muskogee, OK 74403

YOUR POLICY IS ENCLOSED..... PLEASE READ YOUR POLICY CAREFULLY and retain for future reference.

Policy Type: Commercial Package  
Company: CNA Insurance Co  
Policy Number: 1036283675

The policy has been placed on a 'Direct Billed' program which means you will receive your billing statement directly from the carrier.

In the event of loss or if there are any changes in the conditions existing at the time this policy was issued, please notify us at once.

If you have any questions or need assistance, please contact your agent, BancFirst Insurance - Muskogee, or me as soon as possible.

It is our business to protect and serve your interests and we appreciate the opportunity.

Sincerely,



Megan Yochum CISR  
Commercial Lines Account Manager  
Megan.Yochum@bancfirst.insurance  
918-681-7014

Encl.

**POLICY NUMBER**  
B 1036283675

**INSURED NAME AND ADDRESS**  
OKLAHOMA SCHOOLS ADVISORY COUNCIL  
2403 N 41ST ST E  
MUSKOGEE, OK 74403-1889

**LIMIT OF INSURANCE**

**PROPERTY COVERAGE**

The following deductible applies unless a separate deductible is shown on the Schedule of Locations and Coverage.

Deductible: \$1,000

Business Income and Extra Expense Coverage  
Business Income and Extra Expense

12 Months Actual Loss Sustained

Business Income and Extra Expense - Dependent Properties	\$10,000
Employee Dishonesty	\$25,000
Forgery and Alteration	\$25,000

**LIABILITY COVERAGE**

**LIMIT OF INSURANCE**

Liability and Medical Expense Limit - Each Occurrence	\$1,000,000
Medical Expense Limit -- Per Person	\$10,000
Personal and Advertising Injury	\$1,000,000
Products/Completed Operations Aggregate	\$2,000,000
General Aggregate	\$2,000,000
Damage To Premises Rented To You	\$300,000
Employment Practices/Fiduciary Liability EPLI Deductible: \$0	Retroactive Date: 08/25/2008 \$10,000
Hired Auto Liability	\$1,000,000
Nonowned Auto Liability	\$1,000,000

CNA Connect

Renewal Declaration

**POLICY NUMBER**  
B 1036283675

**COVERAGE PROVIDED BY**  
CONTINENTAL CASUALTY COMPANY  
151 N Franklin  
CHICAGO, IL 60606

**FROM - POLICY PERIOD - TO**  
08/25/2018 08/25/2019

**INSURED NAME AND ADDRESS**  
OKLAHOMA SCHOOLS ADVISORY COUNCIL  
2403 N 41ST ST E

MUSKOGEE, OK 74403-1889

**AGENCY NUMBER**  
079795

**AGENCY NAME AND ADDRESS**  
BANCFIRST INSURANCE SERVICES INC  
5591 S LEWIS AVE  
TULSA, OK 74105  
Phone Number: (918)747-4100

000004  
**BRANCH NUMBER**  
740

**BRANCH NAME AND ADDRESS**  
OKLAHOMA CITY BRANCH  
3817 NW EXPRESSWAY STE 710  
OKLAHOMA CITY, OK 73112  
Phone Number: (405)767-5000

This policy becomes effective and expires at 12:01 A.M. standard time at your mailing address on the dates shown above.

The Named Insured is a Corporation.

Your policy is composed of this Declarations, with the attached Common Policy Conditions, Coverage Forms, and Endorsements, if any. The Policy Forms and Endorsement Schedule shows all forms applicable to this policy at the time of policy issuance.

The Estimated Policy Premium Is \$517.00

**Terrorism Risk Insurance Act Premium** \$8.00

Audit Period is Not Auditable





OKLAHOMA TAX COMMISSION  
STATE OF OKLAHOMA

ROBERT E. ANDERSON, Chairman  
ROBERT V. CULLISON, Vice-Chairman  
DONALD BATEK, Secretary-Member  
August 30, 1996

2501 LINCOLN BLVD.  
OKLAHOMA CITY, OKLAHOMA 73154-0001

TAX POLICY & RESEARCH DIVISION  
TONY MASTIK, DIRECTOR  
(405) 521-3133

Oklahoma Schools Advisory Council  
P. O. Box 2308  
Muskogee, OK 74402

FIN: 73-1091436

Dear Sir/Madam:

This is in response to your request for documentation concerning the sales taxability of purchases made by the Oklahoma Schools Advisory Council, Muskogee, Oklahoma. This entity of government is exempt from payment of state/local sales taxes pursuant to Title 68 O.S. 1994 Supp., Section 1356(1) which reads as follows:

"There are hereby specifically exempted from the tax levied by this article:

- (1) Sale of tangible personal property or services to the United States government or to the State of Oklahoma, any political subdivision of this state or any agency of a political subdivision of this state; . . . ."

We do not issue "sales tax exempt numbers" to entities that are exempt by statute. They may provide vendors with a copy of this letter for documentation concerning your sales tax exemption. Travel expenses incurred on a reimbursable basis are not sales tax exempt.

The response contained in this letter applies only to the fact situation provided in your letter of August 28, 1996. Any change in the facts surrounding the transaction described, invalidates this letter. This letter may not be used by any entity other than the addressee.

If you have any questions concerning this matter or if I can be of further assistance, please feel free to contact me at (405) 521-3133.

Sincerely,

BUSINESS TAX DIVISION

Michael G Pillow  
Tax Policy Analyst  
Tax Policy & Research Division

MGP:tk



# Amendment of Solicitation

Date of Issuance: 2/7/19

Solicitation No. 2650000356

Requisition No. 2650006583

Amendment No. 1

Hour and date specified for receipt of offers is changed:  No  Yes, to: \_\_\_\_\_ CST

Pursuant to OAC 260:115-7-30(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:**

5005 N Lincoln Blvd  
Ste 300

Richard Williams  
Contracting Officer

OKC, OK 73105 -  
or

405 - 522 - 1040  
Phone Number

**Personal or Common Carrier Delivery:**

5005 N Lincoln Blvd  
Ste 300

Richard.Williams@omes.ok.gov  
E-Mail Address

OKC, OK 73105 -

**Description of Amendment:**

a. This is to incorporate the following:

Below are the answers to all questions received:

Q1: Our company provides training regarding crisis prevention, primarily for education and health care facilities. Would this training be relevant to the above RFP?  
A1: No

Q2: Do you have a copy of the OSDE paraprofessional training curriculum please?  
A2: See the attached Special Education Paraprofessional Facilitator Guide.

Q3: Does the supplier require any state teacher certifications or the like in order to be considered?  
A3: No

Q4: Can you confirm that the vendor should offer two, 24-hour and two, 6-hour trainings during the initial contract period of award to June 30, 2019?  
A4: We will work with the selected supplier to make a final determination if the number of trainings should be adjusted.

Q5: How much time (if any) would OSDE like between the delivery of the 24 hours of training and the 6 hours of training?  
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Q6: Page 13, section B.4 states that the supplier may not subcontract this work out. Does this mean that no portion of the work may be subcontracted even if it is a small portion of the work?

A6: Section B.4 is standard contract language for this agency's RFP's. For this RFP the OSDE will contract with one (1) Supplier. However, in this instance, the Supplier may subcontract a portion of the work specified in the RFP, but the Supplier must obtain the written consent and approval of OSDE. The terms of this contract and such additional terms as OSDE may require shall be included in any approved subcontract and any approval of any subcontract shall not relieve the supplier of any responsibility for performance under this contract.

All payments for products shall be made directly to the Supplier. No payments shall be made to the Supplier for any services performed pursuant to this Contract by unapproved or disapproved employees of the Supplier or a subcontractor

Q7: Is there an anticipated budget for this work?

A7: No budget information is available.

Q8: Is there a current vendor offering this training? If so, who is it?

A8: No

Q9: It appears that in the past, this course has been provided at a cost to students. Is the intention that the selected vendor continue to be able to charge for participation?

A9: The supplier will not be able to charge for the training. That's what we are paying for.

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A10: It is the same training offered in a different format, hence the requirement of using the OSDE curriculum.

Q11: How many participants does OSDE expect the vendor to accommodate at each of the four training events? (Oklahoma City (24 Hour), Oklahoma City (6 Hour), Tulsa (24 Hour) and Tulsa (6 Hour))

A11: Up to 100.

b. All other terms and conditions remain unchanged.

Oklahoma Schools Advisory Council

Supplier Company Name (PRINT)

2/13/19

Date

Kaylin Coody

Authorized Representative Name (PRINT)

Associate Director

Title

Kaylin Coody

Authorized Representative Signature



OKLAHOMA SCHOOLS ADVISORY COUNCIL

Billie Jordan, Executive Director  
Dr. Kaylin Coody, Associate Director

2403 N. 41<sup>st</sup> St. E.  
Muskogee, OK 74403

(918) 687-0597  
Fax (866) 887-9686

---

February 11, 2019

To Whom It May Concern:

Please accept the attached proposal to meet solicitation #265000356, Special Education Paraprofessional Training, due 2/14/19.

The Oklahoma Schools Advisory Council (OSAC) was established by the Oklahoma State Legislature in 1980, with a mission of providing professional development to employees of schools. OSAC also provides educational information to state and federal legislators, in advocacy for public schools. OSAC and the employees at OSAC have a long-standing background in providing quality staff to employees in public schools, specifically in the area of special education. It is our belief that every individual interacting with our students, regardless of title, should be provided with quality training to improve their understanding and skills. In recent months, we have assisted over forty Paraprofessionals in meeting the required OSDE Level 1 qualification by passing the Para Pro test, providing training and serving as a testing site.

Please contact me if you have any questions.

Sincerely,

Dr. Kaylin Coody  
Associate Director





OKLAHOMA SCHOOLS ADVISORY COUNCIL

Billie Jordan, Executive Director  
Dr. Kaylin Coody, Associate Director

2403 N. 41<sup>st</sup> St. E.  
Muskogee, OK 74403

(918) 687-0597  
Fax (866) 887-9686

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## Paraprofessional Training Solicitation

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OKLAHOMA SCHOOLS ADVISORY COUNCIL

Billie Jordan, Executive Director  
Dr. Kaylin Coody, Associate Director

2403 N. 41<sup>st</sup> St. E.  
Muskogee, OK 74403

(918) 687-0597  
Fax (866) 887-9686

---

## Introduction

Attached are the required records to submit a bid for Solicitation #2650000356, due 2/14/19 by 3PM.

Oklahoma Schools Advisory Council (OSAC) is submitting a bid to provide training for Special Education Paraprofessionals, meeting the guidelines established by the Oklahoma State Department of Education (OSDE).

### **Agency Background**

The Oklahoma Schools Advisory Council (OSAC) was created as a non-profit organization in 1980 by the Oklahoma State Legislature with a purpose of providing professional development for schools in Oklahoma. Since its inception, OSAC has provided training to school employees at every level: bus drivers and mechanics to teachers and superintendents. OSAC partners with a variety of vendors, other agencies and experienced individuals to insure current and quality professional development opportunities.



2403 N. 41<sup>st</sup> St. E.  
Muskogee, OK 74403

(918) 687-0597  
Fax (866) 887-9686

---

**Proposal for OMES Solicitation #2650000356**

**Due Date 2/14/19 @ 3PM**

**Oklahoma State Department of Education – Paraprofessional Training**

**Scope of Service**

OSAC proposes to provide training to special education paraprofessionals utilizing the curriculum established by the Oklahoma State Department of Education (OSDE). This training is two-fold: (1) the initial twenty-four (24) hours of core training and (2) the additional six (6) hours of training required each year.

- 1) Initial Para Training will cover the six core areas in the OSDE Paraprofessional Training:
  - a. Legal Foundations – key legislation, regulations, guidelines and procedures regarding special education, “people first” language, transition services and disability attitudes
  - b. Responsibilities & Ethics – roles of paras and teachers, developing a “week one” action plan, career success including interviews and job descriptions, and ethical issues for Paras
  - c. IEP Participation – review IEP components and team members, IEP and the Para, secondary transition and related services, and review accommodations and modifications
  - d. Disability Awareness & Instructional Strategies – information re: SpEd categories in Oklahoma, student support and differentiation, assistive and adaptive interventions, and needs of LEP students
  - e. Communication & Interaction Strategies – learning about different and effective communication including nonverbal communication, interacting with various groups and students with different types of disabilities
  - f. Behavior Strategies, Progress Monitoring & Data Collection – identifying behavioral ABCs and working positively with students with different disabilities, providing praise, and keeping quality data.

Time will encompass general information, practical application, and formative assessment of these areas. Participants will be expected to complete class time and documented field experiences as part of the training.

Alignment: As indicated above, the six core areas in the OSDE Paraprofessional Training will be the curriculum for this training, following the suggested time requirements for each module. Workbooks will be purchased from OSDE to insure consistency in materials and presentation.

Location: At a minimum, OSAC will provide one training in the Tulsa area and one in the Oklahoma City area. These trainings will be held at area Vocational Technical Centers and/or at university facilities, as OSAC has hosted other trainings at centers in these areas previously and have verbal

assurance that the sites will work to accommodate this training. Once dates are established, final arrangements will be secured.

Schedule: Within sixty days of being awarded this contract, OSAC will schedule a minimum of the two required Initial Trainings as soon as facilities are secured, giving consideration to typical school calendars and holidays.

Advertising: As OSAC already has avenues to disseminate information about upcoming training, advertising will be easy, through email, at monthly meetings and at other trainings. OSDE will also be asked to share information across the state about these trainings.

Training Documentation & Evaluation: At OSAC trainings, OSAC provides a certificate to each participant indicating dates and number of hours of completed training and has each participant complete an evaluation for each training, compiling that information for consideration and modification for future training.

- 2) Annual Training will include a review of topics previously trained as well as current issues facing Paraprofessionals in the special education classroom. Of specific focus will be role of the Para, communication for the Para, classroom management with students having various disabilities and strategies to provide support in the classroom. A tentative agenda for this training includes
- a. Review of SpEd laws and requirements
  - b. Confidentiality/FERPA
  - c. Child abuse reporting
  - d. Etiologies and avenues of learning
  - e. Behavior and consequences
  - f. Understanding restraint & seclusion
  - g. Classroom strategies, including visual and alternative schedules
  - h. Round Table Q&A – What are your concerns?

Alignment: As indicated above, this training will review the keys areas of the Initial Training. A focus of this training will be alignment with the OSDE priorities of classroom management and instructional strategies.

Location: At a minimum, OSAC will provide one training in the Tulsa area and one in the Oklahoma City area. These trainings will be held at area Vocational Technical Centers and/or at university facilities, as OSAC has hosted other trainings at centers in these areas previously and have verbal assurance that the sites will work to accommodate this training. Once dates are established, final arrangements will be secured.

Schedule: Within sixty days of being awarded this contract, OSAC will schedule a minimum of the two required Annual Trainings as soon as facilities are secured, giving consideration to typical school calendars and holidays.

Advertising: As OSAC already has avenues to disseminate information about upcoming training, advertising will be easy, through email, at monthly meetings and at other trainings. OSDE will also be asked to share information across the state about these trainings.

Training Documentation & Evaluation: At OSAC trainings, OSAC provides a certificate to each participant indicating dates and number of hours of completed training and has each participant complete an evaluation for each training, compiling that information for consideration and modification for future training.

### **Evaluation for “best value”**

Training Program Outlines: Content of all trainings will strictly adhere to the priorities established by the OSDE for Paraprofessionals.

Initial Training will focus on the OSDE published workbook, following OSDE recommended timelines for instruction. Use of websites and videos included in the OSDE curriculum provides additional consistency in training.

Annual Training will include some review of information presented in the Initial Training with a focus on classroom management and instructional strategies, as prioritized by the OSDE. Experience in this field also indicates the need to include information on communication and roles of the Para. To maintain a training environment that provides for individualization, trainings will be for approximately twenty participants.

Experience in this Type of Service: OSAC has decades of extensive experience in providing professional development to both certified and support staff in schools. Specifically, this school year, OSAC staff and partners have held numerous trainings related to special education, including *Appropriate & Effective Management for Students with Disabilities*, *Student Due Process*, *Paraprofessional Training & Assessment*, *Reading Strategies for Struggling Readers*, *Writing for Your Grade Level*, *Student Discipline for Administrators*, and *Classroom Strategies*. Between Aug. 1 and Dec. 15, 2018, OSAC provided forty eight (48) part or whole days of training for school personnel across the state.

Cost:

Initial Paraprofessional Training (24 hours)

Training Cost (Tulsa & OKC)	\$3,500 x 2
Training Materials	300 x 2
Hotel (estimate)	140 x 2
Mileage to OKC* (estimate)	140 x 1
	<u>\$8,020</u>

Annual Paraprofessional Training (6 hours)

Training Cost (Tulsa & OKC)	\$1,500 x 2
Hotel (estimate)	\$140 x 2
Mileage to OKC* (estimate)	140 x 1
	<u>\$3,420</u>

TOTAL \$11,440

\*OSAC trainers will only request mileage reimbursement for those trainings held in OKC.

Should these trainings reach maximum enrollment and OSDE requests additional trainings at these or other locations, OSAC would provide that training at comparable costs.

Resumes

Initial and Annual Paraprofessional Training will be led by Dr. Kaylin Coody (resume attached). Dr. Coody recently retired after 38 years of service in public schools in Oklahoma. Throughout her tenure, she was provided services and support to children with disabilities and the staff in those classrooms. She has provided training at many local, regional and national conferences during her career. Working with OSAC, Dr. Coody has focused specifically on the needs in the special education classroom, with both support and certified staff.

Executive Summary

The Scope of Service is addressed above. There are no exceptions identified. A resume is attached for staff assigned to this contract.

Company Profile

OSAC was established as a non-profit organization in 1980 through statute in the Oklahoma legislature. Since that time, this organization has provided a plethora of training opportunities to employees of schools across the state. Ms. Billie Jordan was hired as Executive Director in 2015, with an intent to increase the professional development opportunities based on the requests of administrators and teachers across the state. In 2018, Dr. Kaylin Coody was hired as Associate Director. She has 38 years of experience in providing and supervising services to students with special needs in schools. She continues to serve on multiple committees at various

levels, to stay abreast of current info in the schools. In addition, OSAC partners with other agencies (such as OSDE, CCOSA, OSSAA, the University of Oklahoma, and OROS) and experienced individuals (attorneys, financial experts, university personnel, etc.) to meet the PD needs of the schools served. In addition to special education topics provided in the “best value” section above and on Dr. Coody’s resume, in the fall of 2018 alone OSAC has provided training at multiple sites in areas such as *Bus Driver Inspection, Finance in the Schools, Encumbrance Clerks & Treasurers Update, Care & Prevention of Athletic Injuries, Classroom Management, Safety Training for School Employees, Instructional Coaches Co-hort, Child Abuse Reporting, Quality Math Instruction, Reading for Struggling Readers, and Writing at Your Grade Level.*

**Program Description**

**Detailed Cost Proposal:**

**Initial Paraprofessional Training (24 hours)**

Training Cost (Tulsa & OKC)	\$3,500 x 2 – each training cost is \$3,500, for a total \$7,000 for two
Training Materials	300 x 2 – each participant in the Initial training will be provide the OSDE workbook for Paraprofessional Training (\$15 each)
Hotel (estimate)	140 x 2 – one overnight stay for each training, in OKC and Tulsa
Mileage to OKC* (estimate)	<u>140 x 1</u> – mileage reimbursement for training in OKC
	\$8,020

**Annual Paraprofessional Training (6 hours)**

Training Cost (Tulsa & OKC)	\$1,500 x 2 – each training cost is \$1,500, for a total of \$3,000
Hotel (estimate)	\$140 x 2 – one overnight stay for each training, in OKC and Tulsa
Mileage to OKC* (estimate)	<u>140 x 1</u> – mileage reimbursement for training in OKC
	\$3,420

TOTAL \$11,440

\*\*costs for copies made for all training will be provided by OSAC\*\*

**Billing Practices & Milestones**

OSAC will provide OSDE an itemized invoice within 45 days of the completion of each training. Copies of sign-in sheets will be attached. Completion of the contract will be assessed by the timelines and completion of the training.



# Dr. Kaylin Coody

“Value every child....every day!”

11529 South Mingo Bixby, OK 74008

(918) 369-3633/640-0787

kc.sooner@yahoo.com

<b>Personal</b>	Married to Reed Coody – Two great children, Brian and Sarah, son and daughter-in-law, and two grandchildren	
<b>Education/ Training</b>	Oklahoma State University – Stillwater & Tulsa, Oklahoma Ed.D. in Educational Leadership, minor in Curriculum & Instruction Dissertation: <i>Leadership Strategies in the Course of Change</i>	2003
	University of Tulsa – Tulsa, Oklahoma M.A. in Speech Pathology	1979
	University of Oklahoma – Norman, Oklahoma B.A. in Speech & Hearing	1977
	Oklahoma State Department of Education Certification Superintendent, Elementary Principal, Vocational Administrator, Speech Pathology	1980
	American Speech-Hearing Association Certificate of Clinical Competence	1980-present
	Oklahoma Licensure in Speech-Language Pathology	1980-present
<b>Employment</b>	<b>Oklahoma Schools Advisory Council (OSAC)</b> Associate Director Provide leadership and professional development for school employees. Presentations have included part and/or full day training on topics such as <i>Student Discipline for Administrators, Classroom Strategies, Appropriate &amp; Effective Management for Students with Disabilities, Paraprofessional Training and Assessment, and Internship for Success.</i>	2018-present
	<b>Hilldale Public Schools</b> – Muskogee, Oklahoma Superintendent Oversight of all functions of the district; Create a positive community environment in this independent PK-12 grade district with approximately 1,900 students	2012-18
	<b>Bixby Public Schools</b> – Bixby, Oklahoma Associate Superintendent, Executive Director Supervised various programs in the district, including school operations, special education, homebound, student safety/SafeTeam/SROs, Crisis Plan/Crisis Response Team, student due process, special grants, Medicaid, OCR, Title I, Title III ELL, Title IV Drug-free schools program, Title VII Indian education, Alternative education, child nutrition, transportation, health services, Gifted education, counseling services, student activities drug testing program, student assessment, attendance and enrollment, transfers/affidavits, District Hearing Officer, District Calendar Chair, Negotiations Committee, program policies and administrative procedures for all areas, including all budget responsibilities; student population grew from 2,100 to 5,800	1991-2012
	Speech-Language Pathologist Worked with children ranging from 2-20 years of age	1986-1991
	<b>Northeastern State University</b> – Broken Arrow, Oklahoma Adjunct instructor in graduate level classes, leading to a Masters degree in Educational Leadership and Speech-Language Pathology. Classes taught:	2004-2017



*Public Relations & Schools, Supervision, School Law, Instructional Leadership, Educational Facilities, School Finance, Education Research, Anatomy in Speech-Language Pathology, Early Intervention, Advanced Articulation, and Assistive Technology*

<b>Honors/ Awards</b>	CCOSA Lifetime Achievement Nominee	2018
	CCOSA District 10 Administrator of the Year	2018
	CCOSA State Director of Special Services of the Year	2012
	Bixby Optimist Educator of the Year	2011
	Quotarian of the Year, Quota International of South Tulsa County	2011
	Oklahoma State Department of Education Leadership Mentor to new Special Education Directors across the state	2011-12
	National Health Association Innovative Programs Award (For SafeTeam Program)	2002
	Outstanding Young Women of America	1997
	Teacher of the Year, Gray Elementary – Bixby Public Schools – Bixby, Oklahoma	1991
	<b>Recent Professional Affiliations</b>	Cooperative Council of School Administrators/AASA/OASA, Member
OASA Leadership & Awards Committee		2016-18
Scholarship Selection Committee		2012
Oklahoma School Advisory Council, Member		2012-18
Executive Committee Treasurer		2016-18
Oklahoma State Department of Education		2010-present
Superintendent Hofmeister’s Superintendent Advisory Committee		
Superintendent Hofmeister’s Special Ed Advisory Council		
SDE-ODSS Advisory Committee		
IDEA-B Advisory Panel		
Re-defining the Senior Year Committee		
New Skills for Youth Planning Committee		
Muskogee Area Education Consortium		2012-present
President		2017-18
Vice President		2016-17
Muskogee County Superintendents		
Chair	2016-2018	
Hilldale Education Foundation		
Executive Board	2012-18	
Oklahoma School Personnel Association	2012-18	
United School Superintendents Association	2003-18	
TCASA, Tulsa County Association for School Administrators	2003-12	
Oklahoma State School Board Association	2001-18	

	Oklahoma Directors of Special Services, Member Chair, Honors & Awards Committee Program Committee	1991-2018 1997-2009, 2011-12 1994-95
	Tulsa Area Directors of Special Services, Member President	1991-2012 1993-1994
	American Speech-Language-Hearing Association, National Certification	1975-present
	Oklahoma Board of Examiners for Speech Pathology, Licensure	1981-present
<b>Professional Development</b>	Attendance at many local, state, and national conferences on an annual basis Annually present in-service at local meetings/conferences and several times at state and national conferences. Recent topics have included: High School Internships, Special Education, Behavior Management, School Finance, Working with the Community, Creating Vision, Leadership vs Management, PLC's that Work, District Planning, Speech-Language Pathology, Bond Issues, Inclusion in the Classroom, and Creating a Safe School Environment. Specific topic information available upon request	
<b>Recent Programs Initiated/ Grant Writing</b>	<b>Speech-Language Pathology Alternative Masters Program, NSU</b> Wrote a proposal and contract between Northeastern State University and the Oklahoma State Department of Education to create an expansion of the NSU Masters Level Program to provide more SLPs in public schools.	2017
	<b>Administrative Intern Program at Hilldale</b> Began a program at each site for those with or in the process of receiving administrative certification to shadow their principal and receive some experience with different aspects of being a principal.	2017
	<b>Hilldale Middle School-High School FLEX Schedule</b> Modified the daily schedule to allow a 30 minutes session between 2 <sup>nd</sup> -3 <sup>rd</sup> periods of the day for students to be "flexed" to teachers in classes with poor grades or to make-up work while absent. Those not "flexed" were provided numerous, supervised activities of their choosing. For the first week of October, the ineligibility list dropped from 54 students to 9 students.	2017
	<b>Hilldale Senior Career Internship Program</b> After defining career interests of seniors, recruited local businesses and began off-campus Internships for 51 seniors in the first year, 71 students for the second year. Students worked in an unpaid capacity with two employers in the community for two hours daily. Student placements ranged from machine shops to a hospital, law enforcement to education, and many more. Wrote the curriculum and assessments and taught the lecture portion of this class for students to receive elective credit. Shared with schools across the state for replication.	2017
	<b>Special Olympics</b> Worked with Special Olympics of Oklahoma to host area track and field events at Hilldale for 33 teams, in preparation for state games	2017
	Began Special Olympics at Hilldale, following years of having no team. Staff and community raised funds and provided supports for athletes to participate in area and state competitions	2012-present

Began expansion of this program to provide competitive opportunities for students eligible to participate in Special Olympics, eventually including a high school class elective and being fully supported and funded by the school community at Bixby	Expanded Fall, 1991
<b>Jimmie Johnson Foundation Grant</b> Wrote a grant for <i>Technology Classroom Success</i> to provide tablets for Grades 6-12 students. (\$96,525)	2015
<b>City of Muskogee Foundation Grant</b> Wrote a grant for <i>Technology Focus for the Future</i> to provide tablets for Grades PK-12 students. The grant also provided training for instructional Staff to improve integration of technology in the classroom. (\$442,000)	2014
<b>School Resource Officers</b> Implemented a contract with the Muskogee Police Department to provide two officers to the Hilldale School District on a full-time basis	2014-present
Provided two officers to the Bixby Campus on a full-time basis – supportive role in the grant for funding with the County Sheriff, then transitioned to Bixby Police Dept. officers	2003-12
<b>Hilldale Public Schools – Other Programs Implemented</b> *Bond issues – Passed and implemented in <u>2013</u> \$7.9 million bond issue for facilities throughout the district, including three saferooms, three kitchens/cafeterias, a band room and classrooms; Passed in <u>2017</u> \$15 million bond for facilities through-out the district, including classrooms, a new gym and locker rooms, a secured elementary entrance, and remodeled athletic facilities, technology and textbooks, \$400,000 for transportation *Hilldale Education Foundation – Assisted in founding this educational foundation to support Hilldale Public Schools *Employee of the Month – Recognition of a support and certified staff member each month *Superintendent’s Student Advisory Council – HS students meeting routinely to discuss student issues and go to the legislature to advocate for education *Sup’s On – Open meetings with staff to discuss any topic *Hilldale Learning Academy – Began this alternative education program on campus *Connors Concurrent Enrollment – Began concurrent enrollment for students on the Hilldale campus *Summer Institute – Annual one-week summer voluntary training on a variety of topics for any staff *Leadership Development PLC – Routine meetings with staff desiring to assume leadership roles, many through obtaining a masters degree in educational leadership	2012-present
<b>Professional Learning Communities</b> Established structure and organization for district-wide implementation of PLCs at Hilldale through once weekly late arrival of students, providing staff with a weekly meeting to review student data and plan for student achievement strategies.	2013-present
Serve as part of a Central Office Learning Team to implement district-wide opportunities for staff to learn and use data to improve student	2008-12

learning – Bixby Public Schools

***Exceptional Child Class***

2013-present

Wrote the curriculum and taught an elective class for juniors and seniors at Hilldale to learn about disabilities and serve as peer tutors for students, as they spend time in class with me but most of the time is spent working with younger students.

Wrote curriculum and taught high school class, teaching Bixby High School students about disabilities and peer tutoring

1993-2012

***References***

Available upon request

***“Every day in a classroom is an opportunity to change the life of each child!”***



## Vendor/Payee Form

**Agency:** OMES Vendor Management requires the following information for all new non-registered vendors (payees) before payments may be processed. Information is used to establish the payee in the State's PeopleSoft vendor file for payment and procurement activities.

**DO NOT use this form for:**

- **Garnishment Payees:** Use [OMES Form GarnVendor](#)
- **State Employees:** Use [OMES FORM Employee Vendor Request](#)
- **Vendors pending contract award** to a solicitation released by the division of Central Purchasing or another Oklahoma state agency **MUST** first register online with the state unless exempt per statute. For additional information, please refer to [Central Purchasing Vendor Registration](#).

**AGENCY SECTION** (To be completed by state agency representative):

State agency should email completed and signed form to [vendor.form@omes.ok.gov](mailto:vendor.form@omes.ok.gov) or fax to 405-522-3663.

**VENDOR/PAYEE SECTION** (To be completed by vendor/payee)

*Please print legibly or type this information. Form must be completed and signed by authorized individual. Email or fax to requesting state agency.*

Agency Name	Oklahoma State Dept. of Ed.		Contact Name	
Phone #		Fax #	Email	
<b>Agency Request To</b> – Please select all applicable request types				
<input type="checkbox"/> Add New Vendor	<input type="checkbox"/> Update Existing Vendor	PeopleSoft 10-digit Vendor ID _____		
<input type="checkbox"/> Add New Address	<input type="checkbox"/> Change Address/Location	PeopleSoft Address # _____	PeopleSoft Location # _____	
<input type="checkbox"/> Change Vendor Tax ID	<input type="checkbox"/> Change Vendor Name	<input type="checkbox"/> Add Alternate Payee Name	PeopleSoft Location # _____	
<input type="checkbox"/> Other	Explain _____			
<b>Vendor 1099 Reportable Status</b>	<b>Attention Paying Agency:</b> Please check the <b>Add</b> box on the left if payments to this vendor/payee are represented by Account Codes listed on page 3 of this form. If the vendor is incorrectly showing as 1099 Reportable, check the <b>Remove</b> box. The PeopleSoft system requires specific details regarding the type of transaction. Please check the box that applies to this vendor:			
<input type="checkbox"/> Add:	<input type="checkbox"/> 1 - Rents	<input type="checkbox"/> 2 - Royalties	<input type="checkbox"/> 3 – Other Income	
<input type="checkbox"/> Remove:	<input type="checkbox"/> 6 - Medical & Health Care	<input type="checkbox"/> 7 - Non-Employee Compensation	<input type="checkbox"/> 10 - Crop Insurance Proceeds	
	<input type="checkbox"/> 14 - Gross Proceeds to an Attorney			

**VENDOR/PAYEE SECTION** (To be completed by vendor/payee)

*Please print legibly or type this information. Form must be completed and signed by authorized individual. Email or fax to requesting state agency.*

<b>Payee Information:</b> Please provide the requested information for the payee receiving funds from the Oklahoma state agency. All information should match U.S. Internal Revenue Service filing records for the business, individual or government entity receiving payment.							
Name	Oklahoma Schools Advisory Council		Contact Name	Kaylin Coody			
Payee Legal Name for Business, Individual or Government Entity as filed with IRS			Contact Title	Associate Director			
DBA Name			Phone #	918-640-0787			
Doing Business As "DBA", or Disregarded Entity Name if different than Legal Name			Fax #	866-887-9686			
Tax Identification Number (TIN) and Type:		73-1091436	<input checked="" type="checkbox"/> Federal Employer ID (FEIN) <input type="checkbox"/> Social Security Number (SSN)				
<b>Business Address</b> -- Please provide primary business address as filed with the U.S. Internal Revenue Service							
Address	2403 N. 41st St. E.		City	Muskogee			
State	OK	Zip+4	74403	Remittance Email	kcoody@osac.us		
<b>Optional Addresses</b> – Please select address type as applicable							
Type:	<input type="checkbox"/> Remitting	<input type="checkbox"/> Ordering	<input type="checkbox"/> Pricing	<input type="checkbox"/> Returning	<input type="checkbox"/> Mailing	<input type="checkbox"/> Other:	
Address				City			
State		Zip+4		Remittance Email			
<b>Financial Registration:</b> Please provide contact information for the Authorized Individual who can provide financial information used for ACH Electronic Funds Transfer payment processes. An email will be sent providing instructions for accessing the State of Oklahoma online registration system.							
Name	Billie Jordan		Title	Executive Director		Email	bjordan@osac.us

The information below is requested under U.S. Tax Laws. Failure to provide this information may prevent you from being able to do business with the state, or may result in the state having to deduct backup withholding amounts from future payments.

**U.S. Taxpayer Identification Number (TIN)**

Federal Employer Identification Number (FEIN) 73-1091436 If none, but applied for, date applied \_\_\_\_\_

U.S. Social Security Number (SSN) \_\_\_\_\_ If none, but applied for, date applied \_\_\_\_\_

**Entity Filing Classification:**

Domestic (U.S.) Sole Proprietor or Individual  Domestic (U.S.) Partnership  Domestic (U.S.) Corporation Type: \_\_\_\_\_

Limited Liability Company Type: \_\_\_\_\_

LLC Disregarded Entity:  YES  NO **Must be verified by LLC's tax division. If applicable, parent name/tax id is required.**

Domestic (U.S.) Other Explain: \_\_\_\_\_

Foreign (Non-U.S.) Sole Proprietor or Individual\*  Foreign (Non-U.S.) Partnership\*  Foreign (Non-U.S.) Type: \_\_\_\_\_

Foreign (Non-U.S.) Other\* Explain: \_\_\_\_\_

**FOREIGN VENDOR INSTRUCTIONS: \* ADDITIONAL DOCUMENTATION IS REQUIRED.**

Please submit the proper U.S. Internal Revenue Service (IRS) Form W-8, Certificate of Foreign Status. Select form below matching the payee's entity or individual description. Please refer to IRS for additional instructions (<http://www.irs.gov/pub/irs-pdf/fw8.pdf>).

- **Form W-8BEN:** Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals). <http://www.irs.gov/pub/irs-pdf/fw8ben.pdf>
- **Form W-BEN-E:** Certificate of Status of Beneficial Owner for United States Tax Withholding and Reporting (Entities). <http://www.irs.gov/pub/irs-pdf/fw8bene.pdf>
- **Form W-8ECI:** Certificate of Foreign Person's Claim That Income is Effectively Connected With the Conduct of a Trade or Business in the United States. <http://www.irs.gov/pub/irs-pdf/fw8eci.pdf>
- **Form W-8EXP:** Certificate of Foreign Government or Other Foreign Organization for United States Tax Withholding and Reporting. <http://www.irs.gov/pub/irs-pdf/fw8exp.pdf>
- **Form W-8IMY:** Certificate of Foreign Intermediary, Foreign Flow-Through Entity, or Certain U.S. Branches for United States Tax Withholding and Reporting. <http://www.irs.gov/pub/irs-pdf/fw8imy.pdf>

This may exempt you from backup withholding. Form W-8 does not exempt you from the 30% (or lower percentage by treaty) non-resident withholding taxes. To claim this exemption, you must file IRS Form 8233 with us. For more information, refer to IRS Publication 519.

**SIGNATURE - AND SUBSTITUTE IRS FORM W-9 CERTIFICATION**

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below), and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions: You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement account (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN.

  
Signature of Vendor Representative or Individual Payee

2/12/19  
Date

Kaylin Coody  
Title of individual signing form for company

Oklahoma Schools Advisory Council  
Vendor/Payee (Must be the same as Payee Name from page 1)