

REQUEST FOR PROPOSALS

REGIONAL TRANSIT DISPATCH COORDINATION, TECHNOLOGY ASSESSMENT, PROCUREMENT, AND IMPLEMENTATION ASSISTANCE

*Regional Coordination • Governance • Technology • Procurement • Pilot
Implementation • Sustainability*

Issued By: South Western Oklahoma Development Authority (SWODA)

Implementing Organization: Southwest Oklahoma Regional Transportation Planning
Organization (SORTPO)

Project Area: 16-County Southwest Oklahoma Region

Solicitation No.: RTPO-RD-2026-03

Procurement Method: Competitive Request for Proposals • Best-Value Selection

Anticipated Contract: Firm-Fixed-Price or Not-to-Exceed Professional Services
Contract

Anticipated Contract Period: 12–18 Months

Procurement Milestone	Date
RFP Advertisement / Release	September 14, 2026
Written Questions Due	September 24, 2026 – 4:00 p.m. CT
Responses / Addenda Issued	September 30, 2026
Sealed Proposals Due	October 15, 2026 – 2:00 p.m. CT
Anticipated Interviews	November 2–5, 2026
Anticipated Notice of Intent to Award	November 2026
Anticipated Notice to Proceed	November–December 2026

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SECTION 1. NOTICE OF SOLICITATION AND PROCUREMENT OVERVIEW

The South Western Oklahoma Development Authority (SWODA), acting as contracting agent on behalf of the Southwest Oklahoma Regional Transportation Planning Organization (SORTPO), invites qualified consulting firms or multidisciplinary consultant teams to submit competitive proposals for Regional Transit Dispatch Coordination, Technology Assessment, Procurement, and Implementation Assistance.

The selected Consultant shall evaluate existing transportation coordination and dispatch operations, determine the most appropriate governance and operating structure, assess software and equipment needs, develop procurement-ready requirements, assist with vendor/operator procurement as authorized, support pilot implementation during the grant period, and develop a sustainable long-term business and funding model for the sixteen-county SORTPO region.

This procurement is intended to use the competitive proposal / best-value method. Award will not be based solely on lowest price. Technical approach, relevant rural transit and regional coordination experience, governance and implementation capability, key personnel, stakeholder engagement, and cost/value will be evaluated in accordance with the criteria stated in this RFP.

1.1 Sealed Proposal Submission

Proposals shall be submitted in sealed packages and received by SWODA by the stated deadline. The Technical Proposal and Cost Proposal shall be submitted as separate sealed components. At the scheduled opening, SWODA may publicly acknowledge the names of timely proposers. Technical content, pricing, evaluation materials, scoring, and rankings shall remain controlled during evaluation except as otherwise required by applicable law.

The use of sealed packaging does not convert this RFP into a sealed-bid procurement. This is a competitive proposal procurement in which price is one evaluation factor among several disclosed factors.

1.2 Questions and Addenda

All questions, requests for interpretation, and requests for clarification shall be submitted in writing to the SWODA-designated procurement contact by the deadline shown on the cover. Only written addenda issued by SWODA may modify this RFP. Proposers shall not rely on oral explanations or instructions. Prospective proposers shall not contact evaluation committee members concerning this procurement outside the formal question-and-answer process.

1.3 Reservation of Rights

- Reject any or all proposals;

- Waive minor informalities when legally permissible and when competition is not prejudiced;
- Request clarifications or additional information;
- Conduct interviews, reference checks, and due-diligence reviews;
- Negotiate scope, schedule, and price with the highest-ranked proposer;
- Cancel, amend, or reissue the solicitation;
- Award all or part of the requested services when permitted;
- Make no award when determined to be in SWODA's best interest and consistent with applicable requirements.

SECTION 2. PROJECT BACKGROUND

SORTPO serves a sixteen-county region encompassing Beckham, Caddo, Comanche, Cotton, Custer, Grady, Greer, Harmon, Jackson, Jefferson, Kiowa, McClain, Roger Mills, Stephens, Tillman, and Washita Counties. The region is predominantly rural, with residents frequently traveling across municipal and county boundaries to access healthcare, employment, education, veterans services, nutrition, shopping, and other essential services.

Public transportation and specialized transportation services within the region are provided by multiple independent organizations, including Federal Transit Administration (FTA) Section 5311 rural public transportation providers, Community Action Agencies, tribal transportation programs, veterans transportation providers, healthcare and human service organizations, and other public, nonprofit, and private transportation resources.

Public and stakeholder engagement conducted through SORTPO's regional transportation planning efforts has consistently identified transportation access as an important regional concern. Rural geography, long travel distances, limited transportation resources, differing service areas and operating hours, and the need for cross-county transportation create challenges that cannot always be addressed effectively within individual agency or jurisdictional boundaries.

2.1 Current Regional Dispatch Environment

There is currently no single organization responsible for regional transit dispatch or coordinated trip scheduling across the SORTPO region. Transportation providers generally manage their own reservations, scheduling, dispatching, customer communications, vehicle assignments, and reporting. Providers may use different software systems, technologies, operating procedures, eligibility requirements, service areas, hours of operation, and staffing structures.

The absence of a common regional structure may limit opportunities to coordinate trips, improve vehicle utilization, facilitate cross-county transportation, reduce unnecessary duplication, share information appropriately among participating providers, and connect residents with the transportation resource best suited to meet their needs. At the same time, any regional approach must respect provider

independence, funding requirements, existing operating responsibilities, local service policies, and contractual obligations.

This RFP does not presume that all transportation services should be centrally dispatched or that participating providers should relinquish control of their individual operations.

2.2 Role of SWODA and SORTPO

SWODA will serve as the contracting agent for this project. SORTPO will be responsible for project implementation and regional coordination. SORTPO's role is to convene, plan, coordinate, facilitate, and assist with implementation of a regional solution. SWODA and SORTPO do not currently intend to become the permanent operator of a regional transit dispatch center or to assume responsibility for directly operating public transportation services.

A central purpose of this project is therefore to determine whether a regional dispatch or coordinated scheduling structure is feasible and, if so, who should operate it, how participating organizations should be structured, what technology and equipment are required, how implementation should occur, and how the operation can be financially sustained beyond the initial grant period.

2.3 Regional Dispatch Pilot Opportunity

Funding available through the Rural Health Transformation initiative provides an opportunity to move beyond conceptual planning and evaluate implementation of a regional dispatch pilot during a limited grant period. The Consultant shall organize work so that assessment, decision-making, procurement preparation, and implementation activities can advance concurrently when appropriate and when authorized by SWODA.

2.4 Technology and Operational Considerations

Technology shall be evaluated as a component of the recommended operating model rather than as the sole focus of the project. The Consultant shall assess existing scheduling and dispatch systems and determine the level of interoperability, replacement, integration, shared technology, or hybrid technology necessary to support the recommended regional model.

2.5 Healthcare, Medicaid, Veterans, and Human Service Transportation

Because transportation access can directly affect healthcare access and health outcomes in rural communities, the project shall evaluate appropriate opportunities to coordinate regional dispatch with Medicaid Non-Emergency Medical Transportation (NEMT), hospitals and health systems, rural health clinics, Federally Qualified Health Centers, tribal health programs, Veterans Affairs and veterans transportation

programs, and other human service transportation resources. The project does not presume that SWODA or SORTPO will become a Medicaid transportation broker.

2.6 National Peer Learning and NADO Coordination

SWODA and SORTPO recognize that rural regions in other states have implemented a range of centralized dispatch, coordinated scheduling, shared technology, regional transportation coordination, and multi-provider operating models. The project shall incorporate national peer experience to assist SORTPO in determining which approaches are applicable to southwest Oklahoma and which approaches should be avoided.

SORTPO intends to seek peer-learning and technical-resource assistance from the National Association of Development Organizations (NADO) and/or NADO Research Foundation, subject to availability and willingness to participate. The selected Consultant shall incorporate relevant national experience into the development of the regional dispatch concept.

2.7 Implementation-Oriented Project

This project is intentionally structured to move beyond preparation of a feasibility study or planning report. The desired outcome is an actionable path from regional concept to procurement, pilot implementation, and continued operation. The selected Consultant shall function as an independent planning and implementation advisor to SWODA and SORTPO.

SECTION 3. FUNDING STATEMENT

This project is funded through Oklahoma's Rural Health Transformation Program (RHTP). This project is supported by the Centers for Medicare & Medicaid Services (CMS) of the U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$223,476,948.62 with 100 percent funded by CMS/HHS. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement by, CMS/HHS or the U.S. Government.

The selected Consultant shall comply with all applicable terms and conditions of the federal award and any applicable SWODA subaward or grant requirements. SWODA will provide award-specific flow-down requirements applicable to the resulting contract.

SECTION 4. PROJECT OBJECTIVES

Assess existing transportation dispatch, scheduling, communications, technology, staffing, costs, and service practices across participating providers.

Identify unmet regional transportation needs, cross-county travel patterns, duplicated or fragmented services, and opportunities for more efficient use of existing transportation resources.

Determine provider readiness, interest, and capacity to participate in regional dispatch or shared technology.

Evaluate alternative governance and operating structures, including third-party contracted dispatch, an existing FTA Section 5311 provider, a Community Action Agency, a regional partnership/shared-governance structure, and hybrid approaches. Evaluate regional dispatch technology alternatives and define software, hardware, telephony, communications, cybersecurity, interoperability, and data requirements. Identify equipment, staffing, training, implementation, and recurring operating requirements for both the regional operator and participating transportation providers. Evaluate appropriate Medicaid/NEMT, healthcare, veterans, tribal, and human service transportation integration opportunities.

Conduct a decision-oriented national peer review with direct operator interviews and coordination with NADO/NADO Research Foundation and other national resources as appropriate.

Develop procurement-ready specifications and independent cost information for authorized software, equipment, or operating procurements. Provide independent procurement and implementation assistance during the grant period while avoiding organizational conflicts of interest.

Develop a Regional Dispatch Business Plan with a five-year financial model, sustainable funding strategy, cost-sharing methodology, implementation schedule, and measurable performance standards.

Support pilot deployment and evaluate initial performance and lessons learned.

SECTION 5. REQUIRED STAKEHOLDERS

The Consultant shall be responsible for organizing, facilitating, documenting, and reporting stakeholder engagement. SWODA and SORTPO will assist with introductions and regional contacts, but the Consultant shall lead the engagement process.

5.1 Transportation Providers

- All FTA Section 5310 and 5311 rural public transportation providers serving or materially affecting the SORTPO region
- Community Action Agencies
- Tribal transportation programs
- Veterans' transportation providers
- Human service transportation providers
- Non-emergency medical transportation providers
- Other public, nonprofit, or private providers identified during the study

5.2 State and Public Agencies

- Oklahoma Department of Transportation
- Oklahoma Health Care Authority
- Oklahoma Human Services
- Oklahoma Department of Rehabilitation Services
- Oklahoma Department of Veterans Affairs
- Oklahoma Department of Commerce
- Other applicable state agencies

5.3 Healthcare and Human Service Stakeholders

- Regional hospitals and health systems
- Rural health clinics
- Federally Qualified Health Centers
- Tribal health programs and Indian Health Service facilities, as appropriate
- Medicaid managed care or NEMT stakeholders, as appropriate
- Area Agencies on Aging and aging-service organizations
- Disability and human service organizations

5.4 Workforce and Local Government Stakeholders

- Workforce Development Boards
- CareerTech Centers
- Major employers and chambers of commerce
- Counties and municipalities
- Tribal governments
- Economic development organizations

5.5 National Technical Resources and Peer Organizations

- National Association of Development Organizations (NADO) and/or NADO Research Foundation
- Community Transportation Association of America (CTAA)
- National Rural Transit Assistance Program (National RTAP)
- National Association of Regional Councils (NARC)
- National Aging and Disability Transportation Center (NADTC)
- Federal Transit Administration and other national technical resources, as appropriate
- Peer regional councils, COGs, RTPOs, rural transit operators, and multi-provider dispatch programs
- NADO/NADO Research Foundation shall be considered a national peer-learning and technical resource rather than a local project stakeholder. Participation shall be subject to NADO's availability and willingness to participate.

SECTION 6. SCOPE OF SERVICES

Task 1 – Project Management, Kickoff, and Implementation Schedule

The Consultant shall establish project governance, a detailed schedule, communication protocols, risk management procedures, decision gates, and a deliverable-acceptance process. The schedule shall reflect the limited grant period and identify activities that may proceed concurrently after SWODA authorization.

- Conduct one in-person kickoff meeting in Burns Flat.
- Maintain a detailed project schedule identifying critical path, procurement dependencies, and implementation deadlines.
- Conduct biweekly project-management meetings with SWODA/SORTPO staff; meetings may be virtual unless otherwise requested.
- Provide monthly executive-level status updates addressing budget, schedule, risks, upcoming decisions, and grant-timeline impacts.
- Maintain a risk and decision log.

Deliverables:

- Project Management Plan
- Detailed Implementation Schedule / Gantt Chart
- Communication and Stakeholder Engagement Plan
- Risk and Decision Register
- Monthly Progress Reports

Milestone / Decision Gate: Kickoff completed and schedule accepted by SWODA.

Task 2 – Existing Conditions, Provider Inventory, and Regional Dispatch Readiness Assessment

The Consultant shall complete an agency-by-agency assessment sufficient to determine operational readiness and the practical implications of regional coordination.

- Current reservation, scheduling, dispatch, customer-service, driver-communication, and reporting procedures.
- Fleet size and composition; vehicle availability; driver resources; annual trips/passengers; service hours; service areas; cross-county travel; trip denials/unmet requests where data exist.
- Dispatch staffing and supervision; after-hours practices; reservation lead times.
- Existing scheduling/dispatch software, AVL/GPS, tablets/MDTs, telephony, cellular/data services, hardware, licensing, recurring costs, contract expiration dates, data ownership, APIs/interoperability, and cybersecurity requirements.
- Medicaid/NEMT participation, veterans transportation, healthcare/human-service contracts, and other third-party transportation arrangements.

- Provider willingness to share technology, exchange data, coordinate trips, transfer trips, participate in a common call/dispatch function, host regional dispatch, or purchase dispatch as a service.
- Legal, contractual, labor, data-sharing, insurance, and policy barriers identified by providers.

The Consultant shall prepare a Regional Dispatch Readiness Matrix rating each participating provider on operational capacity, technology readiness, organizational willingness, governance readiness, and implementation barriers. Ratings shall be evidence-based and shall not be used to publicly characterize an agency without context.

Deliverables:

- Existing Conditions Report
- Provider Operations and Technology Inventory
- Regional Dispatch Readiness Matrix
- Gap and Barrier Analysis

Milestone / Decision Gate: Decision Gate 1 – SWODA/SORTPO acceptance of the existing-conditions and provider-readiness findings.

Task 3 – Stakeholder Engagement and Meeting Facilitation

The Consultant shall organize, facilitate, document, and report stakeholder meetings. The project shall include a minimum of six (6) required in-person project meetings in the SORTPO region, each with a virtual participation option. Unless otherwise approved by SWODA, the kickoff and major regional stakeholder workshops shall be held at the Burns Flat Conference Center or another SWODA-designated location.

- One in-person Project Kickoff Meeting in Burns Flat.
- Three in-person Regional Stakeholder Workshops.
- One in-person Governance and Sustainability Workshop.
- One in-person Final Recommendations / Implementation Workshop.
- Individual or small-group provider interviews and site visits as needed.
- At least one virtual Regional Dispatch Peer Exchange involving peer operators and, subject to availability, NADO/NADO Research Foundation.

The Consultant's Project Manager and key subject-matter staff shall attend major in-person meetings. The Consultant shall budget all required travel and meeting facilitation costs in its proposal.

3.1 Regional Dispatch Peer Exchange

The Consultant shall organize at least one virtual Regional Dispatch Peer Exchange involving SORTPO, participating providers, representatives from selected peer regions, and NADO/NADO Research Foundation, subject to availability.

The Peer Exchange shall address governance, operating responsibility, dispatch software and technology, staffing, provider participation, cross-county trips, Medicaid/NEMT, healthcare, veterans transportation, costs, funding, sustainability, implementation barriers, and lessons learned.

Deliverables:

- Meeting agendas and materials
- Attendance records
- Meeting summaries and action items
- Stakeholder Feedback Matrix
- Stakeholder Engagement Report
- Peer Exchange Report
- Governance and Stakeholder Findings Summary

Milestone / Decision Gate: Stakeholder engagement integrated into each applicable decision gate; not deferred until the end of the project.

Task 4 – Regional Demand, Service Pattern, and Opportunity Analysis

- Healthcare transportation demand and major medical destinations.
- Veterans transportation demand and major VA-related destinations.
- Workforce and other essential-trip demand, where supported by available data.
- Cross-county and long-distance travel patterns.
- Trip denials, unmet transportation demand, service gaps, and hours-of-service gaps where data are available.
- Potential trip-sharing corridors and recurring destination patterns.
- Opportunities to improve vehicle utilization without reducing local provider service quality.

Deliverables:

- Regional Demand and Service Pattern Analysis
- Priority Coordination Corridors / Opportunity Map
- Unmet Need and Service Gap Summary

Milestone / Decision Gate: Demand findings accepted for use in governance and technology alternatives analysis.

Task 5 – Governance, Operator, and Organizational Alternatives Analysis

The Consultant shall evaluate at least the following alternatives and may propose additional or hybrid alternatives when supported by analysis:

- Alternative 1 – Third-Party Contracted Regional Dispatch Operator.

- Alternative 2 – Existing FTA Section 5311 Rural Transit Provider or Other Qualified Public/Nonprofit Transportation Provider as Lead/Host Operator.
- Alternative 3 – Community Action Agency as Lead/Host Operator.
- Alternative 4 – Regional Partnership / Shared-Governance Model.
- Alternative 5 – Hybrid / Shared-Technology Model in which providers retain some local dispatch functions while sharing common technology or selected regional functions.

Each alternative shall be evaluated using a Governance Alternatives Decision Matrix. The matrix shall compare each alternative against peer evidence, provider acceptance and willingness, legal authority, governance complexity, independence of local providers, staffing, startup time, startup and recurring cost, liability, technology requirements, data-sharing requirements, scalability, cross-county coordination, healthcare/Medicaid compatibility, funding sustainability, implementation risk, and the risk associated with withdrawal of a host or participating partner.

Deliverables:

- Governance and Operator Alternatives Analysis
- Alternative Evaluation Matrix
- Potential Operator Capacity and Willingness Assessment
- Recommended Governance / Operating Model
- Draft Governance Framework and Roles

Milestone / Decision Gate: Decision Gate 2 – SWODA/SORTPO selects or authorizes advancement of a preferred governance/operating model.

Task 6 – National Peer Review and Decision-Oriented Best Practices Assessment

The Consultant shall evaluate a minimum of eight (8) comparable rural or multi-county regional dispatch/transportation coordination programs and conduct direct interviews with representatives of at least four (4) peer operating organizations. The review shall include, to the extent practicable, examples of centralized dispatch, regional partnership, Community Action/rural transit, third-party contracted dispatch, regional development organization/COG/RTPO-led coordination, shared-technology models, and at least one initiative that was unsuccessful, stalled, discontinued, or substantially modified.

- Fresno County Rural Transit Agency – California;
- Region Five RTCC/Region Five Development Commission – Minnesota;
- Southwest Minnesota RTCC/United Community Action Partnership – Minnesota;
- Public Transit Services or comparable rural centralized-dispatch provider – Texas;
- At least one North Carolina multi-county regional/community transportation system;
- At least one regional development organization/COG/RTPO-led model;

- At least one third-party contracted-dispatch model; and
- At least one unsuccessful, stalled or substantially modified regional-dispatch initiative.

The Consultant shall coordinate with SORTPO and, subject to availability, NADO and/or NADO Research Foundation to identify appropriate peer regions, regional development organizations, rural transit systems, national research, and implementation resources.

- Who initiated the regional coordination effort and who currently operates dispatch.
- Governance, ownership, contracting, and provider participation structure.
- Software, telephony, AVL/GPS, mobile equipment, interoperability, and data-sharing arrangements.
- Dispatch staffing, supervision, hours, after-hours practices, and customer-service model.
- Startup costs, annual operating costs, software licensing/recurring fees, and cost-sharing methodology.
- Funding sources and sustainability after startup grants.
- Medicaid/NEMT, healthcare, veterans, tribal, and human service integration.
- Implementation timeline, provider resistance, failed approaches, lessons learned, and changes made after launch.
- What the peer agency would do differently if starting again.

The best-practices assessment shall be decision-oriented. It shall specifically advise which organizational models appear most successful and sustainable for conditions comparable to southwest Oklahoma; which models minimize administrative burden; what staffing and annual operating costs should reasonably be anticipated; what technology approaches are transferable; and what practices SORTPO should adopt or avoid.

Deliverables:

- Peer Program Comparison Matrix
- Documentation of at least four peer interviews
- Regional Dispatch Peer Exchange
- Decision-Oriented Best Practices Report
- Specific Practices Recommended for Adoption / Avoidance

Milestone / Decision Gate: Peer findings incorporated into governance and technology decisions rather than issued solely as a stand-alone literature review.

Task 7 – Medicaid/NEMT, Healthcare, Veterans, Tribal, and Human Service Integration Assessment

The Consultant shall evaluate legally and operationally appropriate ways the recommended regional dispatch model may coordinate with healthcare and human service transportation programs. The Consultant shall clearly distinguish coordinated

scheduling, provider-network participation, subcontracted transportation, referral arrangements, data exchange, and Medicaid brokerage functions.

- Document the applicable Oklahoma Medicaid NEMT structure and regional implications.
- Evaluate opportunities for FTA Section 5310 and 5311 and other eligible providers to participate in Medicaid/NEMT networks or subcontracting arrangements, where permitted.
- Identify requirements for trip authorization, billing/reimbursement, data sharing, eligibility, privacy, duplicate-benefit prevention, and contractual participation.
- Evaluate relationships with hospitals, rural health clinics, FQHCs, tribal health programs, VA/veterans transportation, and human service agencies.
- Identify operational, legal, technology, financial, and regulatory barriers.
- Recommend a phased healthcare/NEMT coordination strategy that does not presume SWODA/SORTPO becomes the Medicaid broker.

Deliverables:

- Medicaid/NEMT and Healthcare Transportation Integration Assessment
- Phased Healthcare and Human Service Coordination Recommendations

Milestone / Decision Gate: Healthcare/NEMT recommendations accepted for incorporation into the business and implementation plan.

Task 8 – Dispatch Technology, Interoperability, and Equipment Assessment

The Consultant shall develop outcome-based functional requirements and evaluate technology alternatives rather than assuming that all providers must replace existing systems or use a particular brand. The analysis shall include at least three technology approaches: a common regional platform, an interoperable/federated model, and a hybrid model.

- Trip reservations and call intake.
- Demand-response scheduling and optimization.
- Real-time dispatch and vehicle assignment.
- AVL/GPS and mapping.
- Driver tablets/MDTs or mobile applications.
- Customer notifications and reminders.
- Multi-provider permissions and data segmentation.
- Reporting, performance dashboards, and auditability.
- APIs/data exchange and interoperability with existing provider systems where feasible.
- Cybersecurity, hosting, data ownership, backup, and business continuity.
- Telephony/call-center requirements, headsets/workstations, network/cellular requirements, and other equipment.

- Initial acquisition/configuration costs and recurring licensing, subscription, hosting, communications, maintenance, support, and replacement costs.
- Peer technology comparison: consultant to determine whether peer regions use:
 - one common dispatch platform;
 - independent systems with interoperability;
 - a hybrid model;
 - centralized call center with decentralized operations;
 - mobile driver applications/tablets;
 - AVL/GPS;
 - automated scheduling;
 - rider portals/apps;
 - telephone/IVR systems; and
 - APIs/data exchange.
- Most importantly, require three technology alternatives for SORTPO:
 - Alternative A – Common Regional Platform
 - Alternative B – Federated/Interoperable Systems
 - Alternative C – Hybrid Regional Technology Model

The Consultant may identify representative commercial solutions to support market analysis but shall maintain vendor neutrality and shall not tailor requirements to a single vendor without documented justification.

Deliverables:

- Technology Alternatives Analysis
- Functional Requirements Matrix
- Equipment and Communications Plan
- Five-Year Technology Cost Model
- Recommended Technology Architecture

Milestone / Decision Gate: Decision Gate 3 – SWODA/SORTPO authorizes preferred technology approach and procurement path.

Task 9 – Staffing, Operations, Training, and Service Standards

- Recommended dispatch/call-center staffing at startup, Year 3, and Year 5.
- Supervision and management requirements.
- Hours of operation and after-hours procedures.
- Call handling, reservation, trip assignment, transfer, cancellation, no-show, emergency, complaint, and escalation procedures.
- Provider roles and responsibilities.
- Training for dispatchers, drivers, supervisors, administrators, and participating provider staff.
- Performance measures and service levels, including call response, trip assignment, on-time performance, denials/unfilled trips, productivity, customer satisfaction, and system uptime as appropriate.

Deliverables:

- Regional Dispatch Operations Plan
- Staffing Plan and Organizational Chart
- Training Plan
- Draft Standard Operating Procedures / Service Standards
- Performance Measurement Framework

Milestone / Decision Gate: Operations plan accepted before pilot launch procurement/configuration.

Task 10 – Participation Agreements, Governance Documents, and Implementation Readiness

The Consultant shall convert the selected governance model into implementation-ready documents. Legal documents prepared by the Consultant shall be subject to review and approval by SWODA legal counsel and shall not be represented as legal advice unless prepared by qualified counsel.

- Draft provider participation agreement / MOU framework.
- Draft lead-agency, shared-governance, or service-level framework applicable to the selected model.
- Data-sharing and confidentiality provisions for review by counsel.
- Cost-sharing methodology and participation commitments.
- Minimum technology/readiness standards for participating agencies.
- Process for adding or withdrawing participating organizations.
- Implementation readiness checklist and written readiness determination criteria.
- The Consultant shall incorporate applicable lessons identified through the Peer Review and Best Practices Assessment into pilot design and implementation and shall identify implementation risks experienced by peer organizations that should be avoided or mitigated by SORTPO.

Deliverables:

- Draft Participation Agreement / MOU Templates
- Draft Governance Documents
- Provider Commitment / Readiness Checklist
- Implementation Readiness Memorandum

Milestone / Decision Gate: Decision Gate 4 – sufficient provider/operator commitment exists to authorize procurement and pilot deployment.

Task 11 – Procurement Assistance

When authorized by SWODA, the Consultant shall prepare procurement-ready documents for dispatch software, equipment, third-party operating services, or other implementation components identified through the study. The Consultant shall serve

as an independent owner-side advisor, support full and open competition, and document assumptions used in cost estimates.

- Develop a procurement strategy identifying the appropriate procurement method, sequencing, schedule, and dependencies for each implementation procurement.
- Develop independent cost estimates before solicitation of implementation procurements, as applicable.
- Prepare outcome-based technical specifications, functional requirements, statements of work, evaluation criteria, cost forms, implementation requirements, and vendor qualification requirements.
- Assist with responses to technical questions and preparation of procurement addenda.
- Support technical evaluation, demonstrations, reference checks, and due diligence as requested by SWODA.
- Provide written evaluation support, implementation-risk analysis, and technical recommendations without assuming selection authority.
- Support contract-scope, implementation, acceptance-testing, and transition planning after selection, as requested.

The Consultant shall not recommend procurement specifications that create an unnecessary barrier to competition. Brand-name references, if used, shall be illustrative unless a documented sole-source or brand-name justification is separately approved.

The Consultant and any affiliate, subcontractor, or team member that materially participates in development of specifications or evaluation criteria shall comply with Section 11, Organizational Conflict of Interest and Procurement Integrity.

Deliverables:

- Independent Cost Estimate(s)
- Procurement Strategy
- Procurement-Ready Technical Package(s)
- Evaluation and Demonstration Materials
- Technical Evaluation Support Memorandum(s)

Milestone / Decision Gate: Decision Gate 5 – SWODA authorizes release and/or award of implementation procurement(s).

Task 12 – Pilot Implementation Assistance

The Consultant shall provide owner-side implementation assistance for the selected pilot solution. The scope may be adjusted depending on the operating and technology model selected, but shall include sufficient technical assistance to move the project into operation during the available grant period.

- Implementation kickoff and vendor/operator coordination.
- Configuration and design review.

- Equipment deployment oversight.
- Data/interface review, where applicable.
- Testing and user-acceptance support.
- Training-plan oversight and launch readiness review.
- Issue/risk tracking.
- Go-live support and early operational monitoring.
- 90-day post-launch implementation review and lessons learned.

Deliverables:

- Pilot Implementation Management Plan
- Go-Live Readiness Assessment
- Implementation Progress Reports
- 90-Day Pilot Performance and Lessons-Learned Report

Milestone / Decision Gate: Decision Gates 6–8 – configuration/training readiness; pilot launch; 90-day performance review.

Task 13 – Regional Dispatch Business Plan and Sustainability Strategy

The Consultant shall prepare a comprehensive Regional Dispatch Business Plan that consolidates the selected governance, operating, technology, staffing, financial, funding, peer-benchmarking, and implementation recommendations into a single implementation-ready document. Where reasonably available, the Consultant shall benchmark startup and recurring costs against comparable peer systems reviewed under Task 6.

- Recommended operator and governance structure.
- Roles of participating providers.
- Staffing and organizational chart.
- Facilities, telephony, technology, and equipment.
- Startup capital budget, including software, equipment, telephony, facility, implementation, and training costs.
- Annual operating budget, including dispatch staffing, supervision, facility/telephone costs, communications, insurance, administration, and contracted services.
- Five-year financial forecast with escalation assumptions and peer-cost benchmarks where reasonably available.
- Software licensing, subscriptions, hosting, support, communications, maintenance, equipment replacement, insurance, and administrative overhead.
- Cost-sharing methodology, including evaluation of per-trip, per-vehicle, fixed participation, subscription, usage-based, or hybrid approaches.
- Funding strategy addressing FTA Section 5311/5310 eligibility considerations where applicable; state and local funding; tribal funding; Medicaid/NEMT revenue potential; healthcare/hospital partnerships; veterans-related

opportunities; workforce-related resources; discretionary grants; provider contributions; and other sustainable sources.

- Sensitivity analysis identifying the annual non-pilot funding necessary to continue operations after CMS implementation funding ends, including the effect of changes in provider participation and trip volume.
- Procurement and replacement cycle.
- Risk register and contingency strategies.
- Implementation schedule through Year 5.

Deliverables:

- Regional Dispatch Business Plan
- Startup Capital Budget
- Five-Year Operating and Financial Plan
- Funding and Sustainability Strategy
- Cost-Sharing Methodology
- Final Implementation Roadmap and Executive Summary

Milestone / Decision Gate: Final Decision Gate – SWODA/SORTPO accepts the business and sustainability plan and identifies next-phase governance/operating responsibility.

SECTION 7. REQUIRED PROJECT MILESTONES AND TARGET SEQUENCE

Gate	Target Sequence	Decision / Output	Minimum Basis
1	60–90 days after Notice to Proceed	Existing conditions and provider readiness accepted	Provider inventory, technology review, readiness matrix
2	Approx. 120 days	Preferred governance/operator model authorized	Alternatives matrix, stakeholder/peer input
3	Approx. 150 days	Preferred technology/procurement approach authorized	Functional requirements, five-year cost model
4	Approx. 180 days	Implementation readiness / participation commitments	Draft agreements, readiness checklist, operator interest
5	As authorized	Software/equipment/operator procurement released/awarded	Independent cost estimate and procurement package
6	Before launch	Configuration/training/go-live readiness	Testing, training, equipment, operating procedures
7	Grant-compatible date	Pilot launch	Written authorization / Notice to Proceed
8	90 days post-launch	Pilot performance review	Performance, issues, lessons learned

The target sequence is intended to prevent the project from becoming a study that delays implementation until the end of the grant period. Proposers may recommend an improved schedule, but shall identify any proposed deviation and explain its effect on implementation timing.

SECTION 8. CONSULTANT STAFFING REQUIREMENTS

The proposed team shall be multidisciplinary and shall include personnel with direct experience sufficient to perform the scope. One individual may serve more than one role when qualifications are demonstrated.

- Project Manager with authority to commit firm resources and responsibility for schedule, budget, quality, and stakeholder coordination.
- Rural Transit Operations / FTA Section 5311 Specialist.
- Regional Dispatch / Demand-Response Operations Specialist.
- Dispatch Technology and Software Procurement Specialist.
- Governance / Intergovernmental Partnership Specialist.
- Financial / Funding and Business-Plan Specialist.
- Stakeholder Engagement Facilitator.
- Medicaid/NEMT or healthcare transportation specialist, whether prime or subconsultant.
- Procurement / federal grant compliance specialist.

The Project Manager and key subject-matter staff shall attend required in-person meetings in the SORTPO region. Proposals shall identify the percentage of time or estimated hours of key personnel, their office location, and their specific responsibilities. Substitution of key personnel after award shall require SWODA approval.

SECTION 9. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS

9.1 Proposal Organization

- Cover Letter and Authorized Signature
- Executive Summary
- Project Understanding
- Technical Approach and Work Plan
- Stakeholder / Peer Engagement Approach
- Project Schedule and Decision-Gate Plan
- Firm and Team Qualifications
- Relevant Project Experience and References
- Implementation / Procurement Experience
- Conflict-of-Interest and Vendor-Neutrality Disclosure
- Cost Proposal – Separate Sealed Component
- Required Certifications, Forms, and Addenda Acknowledgments

9.2 Technical Proposal Requirements

- Describe understanding of the regional problem and the distinction between planning, operating, and technology decisions.
- Explain how the proposer will assess provider willingness and organizational capacity.
- Explain the approach to NADO/peer coordination, direct peer-operator interviews, and the Regional Dispatch Peer Exchange; identify regional dispatch or coordination systems with which the proposed team has direct experience.
- Explain how Medicaid/NEMT and healthcare transportation opportunities will be evaluated without presuming brokerage.
- Describe how software requirements will remain vendor-neutral and outcome-based.
- Describe the proposed implementation/decision-gate approach and how it protects the grant timeline.
- Identify all assumptions, requested exceptions, and information needed from SWODA/SORTPO.

9.3 References

Provide at least three references for comparable projects completed or substantially performed within the past five years. Preference will be given to rural multi-provider transit, dispatch, regional governance, software procurement, or implementation projects. SWODA may contact references not listed when lawfully available.

9.4 Cost Proposal

The Cost Proposal shall be submitted separately. It shall include labor category, loaded hourly rate, estimated hours, extended labor cost, travel, meetings, printing, other direct costs, subcontractor costs, and total not-to-exceed amount. All required in-person travel shall be included. Proposers shall identify optional implementation-support services separately if not included in the base price.

9.5 Proposal Validity and Exceptions

Proposals shall remain valid for 180 calendar days after the proposal due date unless extended by mutual written agreement. Any exception to this RFP or proposed contract terms shall be clearly identified. Failure to identify an exception may be treated as acceptance of the requirement as written.

SECTION 10. EVALUATION, INTERVIEWS, AND SELECTION

10.1 Administrative Responsiveness and Responsibility Review

SWODA will first determine whether each proposal is timely, substantially responsive, includes required certifications and signatures, and is submitted by a responsible proposer. SWODA may waive minor informalities when legally permissible but will not permit material changes that would prejudice competition.

10.2 Scored Evaluation Criteria

Evaluation Factor	Points	Evaluation Emphasis
Project Understanding and Rural-Regional Context	10	Understanding of 16-county rural conditions, multi-provider issues, and project objectives.
Technical Approach and Work Plan	20	Sound methodology, decision gates, deliverables, schedule, and implementation orientation.
Rural Transit / Section 5311 / Multi-Provider Experience	15	Demonstrated comparable rural transit and multi-provider work.
Governance and Regional Partnership Experience	15	Lead-agency, consortium, interlocal, shared-governance, third-party, or comparable models.
Dispatch Technology and Procurement Experience	10	Vendor-neutral requirements, software/equipment assessment, procurement support.
Pilot Implementation Experience	15	Experience moving recommendations into actual deployment and operations.
Project Team / Key Personnel	5	Qualifications, availability, role clarity, on-site capacity.
Stakeholder and Peer Engagement Approach	5	Provider engagement, facilitation, NADO/peer exchange, conflict management.
Cost and Overall Value	5	Reasonableness, completeness, efficiency, and value of proposed level of effort.
TOTAL	100	

10.3 Scoring Scale

- 5 – Substantially exceeds the requirement with specific, credible, demonstrated added value.
- 4 – Exceeds the requirement in meaningful respects.
- 3 – Meets the requirement with an acceptable and complete approach.
- 2 – Partially meets the requirement; notable weaknesses or uncertainty exist.
- 1 – Materially deficient or minimally responsive.
- 0 – Does not address or cannot meet the requirement.

Evaluation worksheets may convert the 0–5 rating to the applicable weighted points. Evaluators shall independently score proposals before consensus discussion.

10.4 Interviews

SWODA may interview the highest-ranked firms. Interviews will be used to clarify and validate written-proposal scores rather than create an undisclosed separate evaluation system. Following interviews, evaluators may revise the scores assigned to disclosed criteria based on information presented during the interview. SWODA reserves the right to select based solely on written proposals.

- Project Manager leadership and availability
- Understanding of regional governance and provider concerns
- Rural dispatch operations experience
- Software procurement and vendor-neutrality approach
- Implementation schedule and grant-deadline management
- Stakeholder facilitation and conflict resolution
- Ability to explain comparable peer outcomes and lessons learned

10.5 Reference Checks, Clarifications, and Negotiation

SWODA may conduct reference checks and request written clarifications. Clarifications shall not be used to permit material revisions that would undermine competition. SWODA may negotiate final scope, schedule, and compensation with the highest-ranked proposer. If negotiations are unsuccessful, SWODA may terminate negotiations and proceed to the next-ranked proposer.

10.6 Approval and Award

The Evaluation Committee will document its recommendation. Final selection and contract award are subject to applicable SWODA management, Executive Committee, and Board of Trustees approvals, including SWODA Board approval where required by SWODA policy. No work shall begin until the contract is fully executed and SWODA issues a written Notice to Proceed.

SECTION 11. ORGANIZATIONAL CONFLICT OF INTEREST AND PROCUREMENT INTEGRITY

The selected Consultant is intended to serve as an independent advisor to SWODA and SORTPO. The Consultant shall disclose actual, potential, or apparent organizational conflicts of interest at proposal submission and throughout the contract term.

The selected Consultant, its parent organizations, affiliates, subsidiaries, subcontractors, and team members that materially participate in development of specifications, statements of work, evaluation criteria, or procurement documents for regional dispatch software, equipment, or operating services shall not compete for or have a financial interest in the resulting procurement when such participation would create an unfair competitive advantage or otherwise be prohibited by applicable federal or state requirements.

The Consultant shall disclose any reseller agreement, referral fee, commission, implementation partnership, preferred-vendor relationship, ownership interest, or other financial relationship with dispatch software vendors, technology providers, transportation management companies, or potential third-party dispatch operators that could reasonably relate to this project.

SWODA may require mitigation, removal of a conflicted team member, exclusion from a later procurement, or other appropriate action. Evaluation committee members and procurement participants shall comply with applicable SWODA conflict-of-interest requirements and may be required to execute conflict-of-interest and nondisclosure statements.

SECTION 12. INSURANCE REQUIREMENTS

Prior to contract execution, the selected Consultant shall provide certificates of insurance evidencing coverage acceptable to SWODA. Unless modified in the final contract, minimum requirements are anticipated as follows:

Coverage	Minimum Limit
Commercial General Liability	\$1,000,000 per occurrence / \$2,000,000 aggregate
Automobile Liability	\$1,000,000 combined single limit, if vehicles are used in performance
Workers' Compensation	Statutory
Employers' Liability	\$500,000 or SWODA-required amount
Professional Liability / Errors & Omissions	\$1,000,000 per claim
Cyber Liability / Privacy	As required if Consultant receives or maintains confidential participant-level data

Final insurance requirements may be adjusted by SWODA based on the negotiated scope and risk profile.

SECTION 13. NONDISCRIMINATION AND BUSINESS PARTICIPATION

The Consultant shall comply with applicable federal and state civil rights and nondiscrimination requirements, including Title VI of the Civil Rights Act of 1964, the Americans with Disabilities Act, Section 504 of the Rehabilitation Act, the Age Discrimination Act, applicable Equal Employment Opportunity requirements, and other requirements incorporated through the federal award.

Consistent with applicable federal requirements and SWODA policy, the Consultant shall take affirmative steps, as applicable, to provide opportunities for small businesses, minority-owned businesses, women-owned businesses, veteran-owned businesses, disadvantaged businesses, and labor-surplus-area firms when subcontracting opportunities exist. This provision shall not be interpreted as an FTA DBE contract requirement unless FTA funding or another applicable requirement is expressly incorporated into the contract.

SECTION 14. FEDERAL, STATE, AND SWODA PROCUREMENT REQUIREMENTS

14.1 Governing Requirements

This procurement and resulting contract shall be administered in accordance with SWODA's adopted procurement and financial policies, applicable Oklahoma law, applicable terms and conditions of the OSDH/CMS award or subaward, and applicable federal requirements including 2 CFR Part 200. To the extent requirements differ, SWODA will apply the requirement legally applicable to the transaction and funding source.

14.2 Competitive Procurement and Full and Open Competition

SWODA intends to use the competitive proposal method authorized by 2 CFR § 200.320. This RFP is intended to permit full and open competition consistent with 2 CFR § 200.319. Proposers shall not condition their response on restrictive arrangements that impair competition or create prohibited conflicts.

14.3 Procurement Documentation and Price/Cost Analysis

SWODA will maintain procurement records sufficient to document the procurement method, contract type, contractor selection or rejection, and basis for contract price. SWODA will perform the price or cost analysis required by applicable federal requirements and will prepare an independent estimate before receiving proposals when required. The selected Consultant shall prepare separate independent cost estimates for later implementation procurements under Task 11 before those solicitations are issued, as applicable.

14.4 Debarment and Suspension

The selected Consultant and covered subcontractors shall not be suspended, debarred, or otherwise excluded from participation in federally funded transactions. SWODA may verify eligibility through the federal System for Award Management (SAM.gov).

14.5 Lobbying

For contracts or awards subject to the Byrd Anti-Lobbying Amendment, the selected Consultant shall execute required certifications and disclosures. Federal funds shall not be used for prohibited lobbying activities.

14.6 Records, Audit, and Access

The Consultant shall retain and provide access to records as required by applicable federal award terms, 2 CFR Part 200, Oklahoma law, and the contract. Authorized representatives of SWODA, OSDH, HHS/CMS, the U.S. Comptroller General, and other authorized oversight entities shall have access to records to the extent required by law or award conditions.

14.7 Prohibited Telecommunications and Equipment Requirements

The Consultant shall comply with applicable federal prohibitions and restrictions concerning covered telecommunications and video surveillance equipment and services, including 2 CFR § 200.216, when applicable to purchases or equipment recommendations under this project.

14.8 Domestic Preference

Where equipment or products are purchased using federal funds, the Consultant shall assist SWODA in applying any domestic preference requirements applicable under 2 CFR § 200.322 and the federal award.

14.9 Subcontractor Flow-Down

The Consultant shall ensure that applicable federal, state, grant, confidentiality, records, audit, debarment, lobbying, nondiscrimination, and conflict-of-interest requirements are incorporated into covered subcontracts.

SECTION 15. FEDERAL CONTRACT PROVISIONS – APPENDIX II TO 2 CFR PART 200

The resulting contract shall include the contract provisions required by Appendix II to 2 CFR Part 200 to the extent applicable to the final contract amount and type. The following provisions are anticipated to apply or require applicability review before contract execution:

- Administrative, contractual, or legal remedies for violation or breach of contract terms when required by the applicable threshold.
- Termination for cause and termination for convenience, including procedures and basis for settlement, for contracts above the applicable threshold.
- Equal Employment Opportunity requirements when applicable.
- Clean Air Act and Federal Water Pollution Control Act requirements for contracts exceeding the applicable federal threshold.
- Debarment and suspension requirements.
- Byrd Anti-Lobbying Amendment certification and disclosure requirements for contracts exceeding \$100,000.
- Other mandatory provisions required by the federal award, OSDH, HHS/CMS, or applicable law.

The final contract will include the full text or legally sufficient incorporation of applicable provisions. Proposers shall identify any requested exception in the proposal; material exceptions may render a proposal unacceptable.

SECTION 16. CONTRACT TERMS AND CONDITIONS

16.1 Contract Type and Compensation

SWODA anticipates a firm-fixed-price or not-to-exceed professional services contract with milestone-based payments tied to accepted deliverables. Optional implementation-support services may be separately priced and authorized by amendment or task authorization, subject to procurement requirements.

16.2 Deliverable Acceptance

Deliverables are subject to SWODA review and written acceptance. SWODA may require correction of material deficiencies before payment. Acceptance of an interim deliverable does not waive subsequently identified deficiencies or contractual obligations.

16.3 Changes

Changes in scope, compensation, schedule, or deliverables must be authorized in writing by SWODA. The Consultant shall not perform out-of-scope work based solely on oral direction.

16.4 Records and Work Product

Reports, analyses, matrices, procurement specifications, cost models, stakeholder summaries, business plans, and other project-specific deliverables paid for under the contract shall be available to SWODA for governmental use. The Consultant retains ownership of pre-existing proprietary tools and methodologies, subject to any license necessary for SWODA to use the deliverables. Data supplied by SWODA or project partners remains the property of the originating entity.

16.5 Confidentiality and Data Handling

The Consultant shall protect confidential, proprietary, personally identifiable, health-related, or security-sensitive information received during the project in accordance with applicable law, agreements, and SWODA requirements. The Consultant shall minimize collection and retention of participant-level data unless necessary for the approved scope.

16.6 Termination

The final contract shall permit termination for cause and convenience as required by applicable federal and SWODA requirements, and shall address notice, cure, compensation for accepted work, records transfer, and transition obligations.

16.7 No Guarantee of Implementation Procurement

Completion of planning or procurement-assistance tasks does not guarantee that SWODA will purchase a particular software platform, equipment package, operating service, or other implementation component. All subsequent procurements are subject to available funding, approvals, and applicable procurement requirements.

SECTION 17. REQUIRED CERTIFICATIONS AND PROPOSAL FORMS

Form	Required Submission
Form A	Proposal Cover Sheet and Authorized Signature
Form B	Proposer Information and Key Contacts
Form C	Project Team and Key Personnel
Form D	Relevant Experience and References
Form E	Technical Approach / Deliverable Compliance Checklist
Form F	Project Schedule and Decision-Gate Schedule
Form G	Cost Proposal
Form H	Subcontractor and Business Participation Disclosure
Form I	Conflict of Interest and Organizational Conflict Disclosure
Form J	Non-Collusion Certification / Affidavit as applicable
Form K	Debarment and Suspension Certification
Form L	Lobbying Certification and Disclosure, if applicable
Form M	Insurance Certification
Form N	Exceptions to RFP / Contract Terms
Form O	Addenda Acknowledgment
Form P	Federal and State Compliance Certification

SECTION 18. COST PROPOSAL FORM

The Cost Proposal shall be submitted as a separate sealed component. All travel for required in-person meetings shall be included. Proposers shall clearly distinguish the Consultant's professional-services fee from estimated future software, equipment, third-party operating, and recurring regional-dispatch costs.

Labor Category	Loaded Hourly Rate	Estimated Hours	Extended Cost	Notes

Direct Expenses:

Expense	Amount
Travel / Mileage / Lodging	
Meeting Facilitation	
Printing / Materials	
Subcontractors	
Other Direct Costs	
TOTAL NOT-TO-EXCEED CONSULTANT FEE	

Separately identify optional or estimated implementation costs not included in the Consultant fee, including software acquisition/configuration, annual software subscriptions, dispatch workstations, tablets/MDTs, AVL/GPS, telephony, cellular/data services, training, third-party dispatch operations, and annual recurring costs. These estimates are planning information and do not constitute authorization to purchase.

SECTION 19. ANTICIPATED CONSULTANT SERVICES BUDGET

For planning purposes, SWODA anticipates a Consultant professional-services budget in the approximate range of \$175,000 to \$250,000 for the comprehensive scope described in this RFP. This range does not include subsequent software purchases, equipment purchases, regional dispatch operating expenses, or recurring software/communications fees. SWODA reserves the right to negotiate scope and compensation consistent with applicable procurement requirements and available funding.

SECTION 20. PROTESTS, OPEN RECORDS, AND PROCUREMENT COMMUNICATIONS

20.1 Protest Procedures

Any protest concerning this procurement shall be submitted in accordance with SWODA's applicable procurement procedures and any protest requirements stated in the solicitation or addenda. Proposers are responsible for timely submission and for identifying the factual and legal basis of the protest.

20.2 Oklahoma Open Records and Proprietary Information

Procurement records may be subject to the Oklahoma Open Records Act and other applicable disclosure requirements. A proposer claiming that specific information is confidential or proprietary shall clearly mark the specific material, provide a redacted public copy when requested, and identify the legal basis supporting nondisclosure. Marking an entire proposal confidential is discouraged and may not be effective. SWODA will make disclosure determinations in accordance with applicable law.

20.3 Procurement Communications

From release of the RFP through award, proposers shall communicate regarding the procurement only through the designated SWODA procurement contact unless SWODA authorizes otherwise. Unauthorized attempts to influence evaluators or decision-makers may be considered in determining proposer responsibility or may result in other action permitted by law.

APPENDIX A. PROPOSAL EVALUATION COMMITTEE SCORING SHEET

Evaluation Factor	Max Points	Evaluator Score	Strengths / Weaknesses	Comments / Proposal Page
Project Understanding and Rural-Regional Context	10			
Technical Approach and Work Plan	20			
Rural Transit / Section 5311 / Multi-Provider Experience	15			
Governance and Regional Partnership Experience	15			
Dispatch Technology and Procurement Experience	10			
Pilot Implementation Experience	15			
Project Team / Key Personnel	5			
Stakeholder and Peer Engagement Approach	5			
Cost and Overall Value	5			
TOTAL	100			

Evaluator Certification: I certify that I have disclosed any actual, potential, or apparent conflict of interest and have evaluated this proposal based on the disclosed RFP criteria.

Evaluator Name: _____ Signature: _____

Date: _____

APPENDIX B. ORGANIZATIONAL CONFLICT OF INTEREST CERTIFICATION

The Proposer certifies that it has disclosed all actual, potential, and apparent organizational conflicts of interest relevant to this project, including financial relationships with dispatch software vendors, technology providers, equipment suppliers, transportation management companies, third-party dispatch operators, and other entities that may compete in a later implementation procurement.

List all relevant relationships or state "None":

Authorized Representative: _____ Title: _____

Signature: _____ Date: _____

APPENDIX C. PROPOSAL SUBMISSION CHECKLIST

- ☐ Signed Cover Letter
- ☐ Technical Proposal
- ☐ Project Schedule
- ☐ Key Personnel Resumes
- ☐ Three or More References
- ☐ Separate Sealed Cost Proposal
- ☐ Subcontractor Disclosure
- ☐ Conflict / Organizational Conflict Certification
- ☐ Non-Collusion Certification
- ☐ Debarment Certification
- ☐ Lobbying Certification / Disclosure, if applicable
- ☐ Insurance Certification
- ☐ Exceptions List
- ☐ Addenda Acknowledgments
- ☐ Federal / State Compliance Certification

APPENDIX D. FEDERAL CONTRACT PROVISIONS CHECKLIST FOR FINAL CONTRACT

SWODA shall finalize applicability before contract execution based on contract value, type, and award terms. This checklist is provided to ensure the procurement file addresses required provisions.

Provision	Applicability / Action	Final Review
Breach / remedies	Apply when required by Appendix II / contract threshold.	☐
Termination for cause and convenience	Apply for contracts over applicable threshold.	☐
Equal Employment Opportunity	Apply when legally applicable.	☐
Davis-Bacon / Copeland	Generally not applicable to this professional-services contract unless covered construction is added.	☐
Contract Work Hours / Safety	Review applicability if covered mechanics/laborers are involved.	☐
Rights to inventions	Review if federal research/experimental award conditions apply.	☐
Clean Air / Clean Water	Apply when contract exceeds applicable threshold.	☐
Debarment / Suspension	Applicable to covered federal transactions.	☐
Byrd Anti-Lobbying	Certification for contracts exceeding \$100,000; disclosures as applicable.	☐
Prohibited telecommunications	Apply 2 CFR § 200.216 where applicable.	☐
Domestic preference	Apply 2 CFR § 200.322 to covered purchases as applicable.	☐
Records / audit / access	Include award-specific federal access and retention requirements.	☐
Subcontractor flow-down	Include all applicable clauses in covered subcontracts.	☐