

Ohio Adoption Loan Program  
RFP#: R-1011-06-8030

**ATTACHMENT E**  
**Technical Proposal Score Sheet**

**PHASE I: Initial Qualifying Criteria**

**Vendor/Applicant Name:** \_\_\_\_\_

The proposal must meet all of the following Phase I proposal acceptance criteria in order to be considered for further evaluation. Any proposal receiving a “no” response to any of the following qualifying criteria **shall be disqualified from consideration**.

ITEM	PROPOSAL ACCEPTANCE CRITERIA	RFP Section Reference	YES	NO
1	Was the vendor’s proposal received by the deadline as specified in the RFP?	Section 2.1, G.		
2	Vendor’s proposal includes all required affirmative statements and certifications, signed by the vendor’s responsible representative, as described in Attachment A and C to the RLB?	Section 5.2.		
3	Included in those certifications, the vendor states that it is not excluded from entering into a contract with ODJFS, due to restrictions related to the federal debarment list, unfair labor findings, or R.C. § 9.24.	Section 2.1, H.		
4	ODJFS’ review of the Auditor of State website verifies that the vendor is not excluded from contracting with ODJFS by R.C. § 9.24 for an unresolved finding for recovery.	Section 2.1, H.		
5	Vendor’s proposal indicates a minimum of five (5) years experience in the field of financial management.	Section 2.1, A.		
6	Vendor’s proposal indicates a minimum of five (5) years experience processing loan applications and tracking repayment to include providing written reports.	Section 2.1, B.		
7	Vendor’s proposal indicates a minimum of five (5) years experience performing activities to include creating loan application forms, reviewing, granting, denying loan applications, loan repayment terms, procedures for collection of loan arrearages and any monetary penalties for loan arrearages or improper use of loan funds.	Section 2.1, C.		
8	Vendor’s proposal includes a photocopy of their certification of deposit insurance approval from the Federal Deposit Insurance Corporation (FDIC).	Section 2.1, D.		
9	Vendor’s proposal indicates a physical customer service location operating in, at minimum, all Ohio major metropolitan areas (i.e., Cleveland, Columbus, Cincinnati, Toledo, Dayton, Youngstown), and in, at minimum, four non-contiguous rural counties.	Section 2.1, E.		
10	Vendor’s proposal provides a detailed description of their internal underwriting process.	Section 2.1, F.		
11	An initial cursory review indicates that the proposal is free from trade secret/proprietary information as specified/restricted in the RFP? (Initial review for compliance done in Phase I; final detailed assessment for compliance done in Phase II.)	Sections 2.2 & 5.2, C.		

**PHASE II: Criteria for Scoring of Technical Proposal**

Qualifying technical proposals will be collectively scored by a Proposal Review Team (PRT) appointed by ODJFS, Office of Families and Children (OFC). For each of the evaluation criteria given in the following score sheet, reviewers will collectively judge whether the technical proposal exceeds, meets, partially meets or does not meet the requirements expressed in the RFP, and assign the appropriate point value, as follows:

0	6	8	10
Does Not Meet Requirement	Partially Meets Requirement	Meets Requirement	Exceeds Requirements

A technical proposal’s total PHASE II score will be the sum of the point value for all the evaluation criteria. The review team will collectively score each individual qualifying proposal. Technical proposals which do not meet or exceed a total score of at least **273** points (a score which represents that it “meets” all the evaluation criteria) out of a maximum of **360** points, will be disqualified from further consideration, and its cost proposal will neither be opened nor considered. Only those vendors whose Technical Proposals meet or exceed the minimum required technical points will advance to PHASE III of the technical proposal score sheet.

ITEM #	EVALUATION CRITERIA	RFP SEC. REF.	Weighting	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
<b>VENDOR EXPERIENCE AND QUALIFICATIONS</b>							
<b>VENDOR EXPERIENCE, CHARACTERISTICS &amp; CAPABILITIES</b>							
1	The vendor has demonstrated adequate geographic coverage by identifying, by county and local community (city, township, etc.) to meet program needs, each currently operating customer service outlet where potential applicants could obtain information on the adoption loan process and submit a loan application.	Section 2.2, A.	3				
2	The vendor has indicated the general hours (days and times) of operation for customer service to potential loan applicants., and their operating hours would meet program needs.	Section 2.2, B.	1				
3	The vendor has provided its average processing time for non-business loan applications, and this processing time is appropriate for meeting program needs.	Section 2.2, C.	1				
4	The vendor has identified, by position and by name, appropriately qualified staff members considered key to the project's success (at minimum, key staff identified must include one specified project manager who would oversee the adoption loan program operations).	Section 2.2, D.	1				
5	The vendor has included resume(s), describing the education, experience, and list of applicable professional accomplishments of the Project Manager and any other key personnel for this project (including subcontractors), and has specifically demonstrated appropriate qualifications and experience of the key staff expected to work on the project.	Section 2.2, E.	1				
6	The vendor has identified key staff with at least a Bachelors degree in business, finance, or related field.	Section 2.2., F.	1				
<b>SCOPE OF WORK &amp; SPECIFICATIONS OF DELIVERABLES</b>							
7	The vendor has described a process to determine if prospective adoptive parents' programmatic eligibility to receive a loan using the three requirements listed in Section 3.1, A. 1. through 2. of the RFP.	Section 3.1, A. 1. and 2.	2				
8	The vendor has addressed the financial institution requirements prospective adoptive parents must also meet to obtain a state adoptive assistance loan.	Section 3.1, A., 3.	2				
9	The vendor has indicated how they would process the loan and loan repayment to the prospective adoptive parent.	Section 3.1., B.	2				
10	The vendor has described a process to collect the repayment of the loan.	Section 3.1., C.	2				
11	The vendor has described a process to track all loan program accounting activities, including, not limited to, arrearages, monetary penalties and interest.	Section 3.1., D.	3				
12	The vendor has indicated how they would deposit any loan repayment, interest, penalties or any other funds received into the loan fund.	Section 3.1., E.	3				
13	The vendor has indicated a process to provide monthly, quarterly, annual written reports (in both paper and electronic format such as via CD-ROM, or other electronic medium as agreed to by ODJFS) to identify the number of applicants, the number of applicants approved, the number of applicants denied and why, the amount of each approved loan, the amount of repayments and fund balance, and any other reports requested by ODJFS.	Section 3.1., F.	3				
14	The vendor has provided a statement confirming a representative, serving as liaison, will attend all Advisory Board meetings, which will occur periodically (monthly or bi-monthly).	Section 3.1., G.	1				
<b>ADMINISTRATIVE STRUCTURES</b>							
15	The vendor has provide an appropriate timeline for the successful management of the proposed project.	Section 3.3., A.	2				

ITEM #	EVALUATION CRITERIA	RFP SEC. REF.	Weighting	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
16	The vendor has provided a status reporting procedure for reporting work completed, and resolution of unanticipated problems.	Section 3.3., B.	1				
17	The vendor has provided a current organizational chart (including any subcontractors) of vendor staff that would be directly involved in this program, specifying the key management and administrative personnel who will be assigned to this project, and their roles, and this chart indicates appropriate assignment of staff for successful management of the project.	Section 3.3., C.	1				
18	The vendor has provided a table showing loan terms that will be offered to adoption program applicants who are granted a two-year rate loan under this program. These terms would be appropriate for the success of the project.	Section 3.3., D.	3				
<b>SELECTED VENDOR COMPENSATION STRUCTURE</b>							
19	The vendor has provided compensation rates using the Cost Proposal Form provided as Attachment F. to this RFP that do not exceed \$50.00 per application processed (regardless of the decision to approve or deny the loan), up to \$25,000 per year, plus an amount equal to no more than ten percent (10%) of the monthly loan repayment actually collected, up to \$25,000 per year.	Section 3.4.	3				
<b>TRADE SECRET INFORMATION</b>							
20	The review team in its comprehensive review of the vendor's proposal has determined that the proposal was free of trade secret/proprietary information as specified/restricted in the RFP. [A "no" response will disqualify the vendor's proposal and will not be considered for award of the contract.]	Sections 2.2 & 5.2, C.			YES	NO	
<b>Column Subtotal of "Partially Meets" points</b>							
<b>Column Subtotal of "Meets" points</b>							
<b>Column Subtotal of "Exceeds" points</b>							
<b>TOTAL SCORE:</b>							

**Based upon the Total Technical Score earned, will the vendor's proposal be considered for award of the contract? (Vendor's Grand Total Technical Score must be at least 273 points.)**

Yes \_\_\_\_\_ No \_\_\_\_\_ (If "No," Vendor's Proposal will not be considered for award of the contract.)

**PHASE III: Vendor's Cost Proposal**

Does the vendor's Cost Proposal comply with Cost Proposal format requirements or pricing limits as stated in this RFP?

Yes \_\_\_\_\_ No \_\_\_\_\_ (If "No," Vendor's Proposal will be considered for award of the contract.)

The vendor's total proposed rates for compensation (even if the proposed total is \$0.00) = \_\_\_\_\_

Is this vendor's total proposed rate the lowest proposed? If yes, this cost proposal is awarded **100 Points**.

Is this vendor's total proposed rate the second lowest proposed? If yes, this cost proposal is awarded **50 points**.

Is this vendor's total proposed rate the third lowest proposed? If yes, this cost proposal is awarded **25 points**.

Is this vendor's total proposed rate higher than the third lowest proposed? If yes, this cost proposal is awarded zero points.

The vendor's grand total score is the sum of its technical quality score and its cost proposal score:

Vendor Name: \_\_\_\_\_

Technical quality Score = \_\_\_\_\_  
 Cost Proposal Score = \_\_\_\_\_  
**GRAND TOTAL SCORE = \_\_\_\_\_**