

ATTACHMENT D
RLB#: R-89-04-0708
Technical Proposal Score Sheet

PHASE I: Initial Qualifying Criteria

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**, and none of its offered candidates will be considered for the project.

Vendor Name: _____

ITEM	PROPOSAL ACCEPTANCE CRITERIA	RLB Section Reference	YES	NO
1	Was the vendor’s proposal received by the deadline as specified in the RLB?	IV./V.		
2	Vendor’s proposal includes all required affirmative statements and certifications, signed by the vendor’s responsible representative, as described in Attachment A to the RFP?	VIII. Attach. B.		
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.	VIII. Attach. B.		
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.	VIII. Attach. B.		
5	Does the vendor provide three (3) project references for past projects similar in size and scope completed in the past five (5) years and does the reference information contain, at minimum, a brief description of key elements of each of the projects, the customers name, and a contact person (name, title, phone number and e-mail address) who would be able to discuss the vendor’s performance with ODJFS	V., A., 1		
6	Does the vendor proposal one comprehensive software package for the full and satisfactory completion of the work described in this RLB (i.e., all modules required under this RLB must be fully functional with the use of just one software package).	V., A., 2		

PHASE II: Criteria for Scoring of Technical Quality

Technical proposals for each qualifying vendor (*i.e.*, those passing all Phase I criteria) and each Report Professional Candidate offered by each qualifying vendor will be collectively scored by a Proposal Review Team (PRT) appointed by ODJFS. Each candidate offered by the vendor will be score separately according to the criteria provided below. For each of the evaluation criteria on the score sheet, reviewers will collectively judge whether the proposal and candidate exceed, meet, or fail to meet the requirements expressed in the RLB, and applying the appropriate weight, assign the appropriate point value, as follows:

- Does Not Meet Requirement/Expectation = 0 points
- Partially Meets = 6 points
- Meets Requirement/Expectation = 8 points
- Exceeds Requirement/Expectation = 10 points

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 **341** points (a score which represents that it “meets” all the evaluation criteria) out of a maximum of **436** 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 #	PHASE II EVALUATION CRITERIA	RLB SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
ORGANIZATIONAL EXPERIENCE & CAPABILITIES							
1	The vendor has a minimum of ten (10) years organizational experience in providing Computer Aided Facility Management (CAFM) software to public sector markets similar to ODJFS with approximately 4,000 employees and 3 million square feet of office space in various locations.	V., B., 1.	2				
2	The vendor has provided background information on the vendor, indicating sufficient organizational experience and staffing to perform the required work. In the event that the vendor proposes the use of any subcontractors, information on the subcontractor(s) and letter of commitment demonstrating the subcontractor(s) role is included.	V., B., 2.	3				
3	The vendor has provided detailed descriptions of at least two (2), but no more than four (4), similar sized projects completed in the past five years that demonstrate expertise in providing CAFM software to commercial and/or public sector markets similar to ODJFS with approximately 4,000 employees and 3 million square feet of office space in various locations.	V., B., 3.	2				
4	The vendor has demonstrated their proficiency with space management applications.	V., B., 4.	2				
5	The vendor has confirmed it's an authorized AutoCad provider for building design applications.	V., B., 5.	3				
STAFF EXPERIENCE AND CAPABILITIES							
6	The vendor has identified, by position and by name, those staff they consider key to the project's success.	V., 1.	1				
7	The vendor has included resume(s) of key staff expected to work on the project.	V., 1.	2				
8	The vendor has designated person to lead the selected contractor's team, who will be the contact person for the ODJFS project manager and IT experts. The proposed project manager (PM) is characterized by each of the following, at minimum: 1) Certification as a project manager (proposals must include a photocopy of current PM certification for the designated PM or provide other independently verifiable evidence, such as a website for the certifying entity where the individual's status may be reviewed); 2) At least four years' experience as a project manager with CAFM projects; 3) At least four years' experience with AutoCad Software; and, 4) A working ability to prepare project plans with MS Project.	V., 1., a.	3				
9	The vendor has designated a person to manage all aspects of system architecture as indicated in the RLB, who will coordinate activities of the vendor's IT development lead, data conversion lead, database administration lead, and system test lead. The proposed ITM is characterized by each of the following, at minimum: 1) At least four years' experience managing large CAFM software implementation projects; 2) Is a Microsoft Windows Certified Engineer; and, 3) Will be committed to the primary project site full-time from contract effective date through post-implementation work.	V., 1., b.	3				
10	The vendor has provided a detailed staffing plan clearly indicating both the vendor's comprehensive of the requirements of the work described in this RLB, and indicating sufficient and appropriate staff to perform it fully.	V., 1., c.	2				

ITEM #	PHASE II EVALUATION CRITERIA	RLB SEC. REF.	Weight	Doesn't Meet	Partially Meets	Meets	Exceeds
	SCOPE OF WORK/ SPECIFICATIONS OF DELIVERABLES			0	6	8	10
11	The vendor has provided an overview of the hardware specifications for the system and explains how the system utilizes storage of data and how it integrates with centralized backup and recovery products such as Tivoli Storage Manager.	VI., 1.	1				
12	The vendor has provided information on the following: a. Operating System b. Application Programming Language c. Network Software d. Communications Software e. Report Writer f. Database g. Browser	VI., 1.	1				
13	The vendor has provided a description of the security specifications and functionality of the proposed system.	VI., 1.	1				
14	The vendor has proposed a system with the ability to interface with ORACLE database version 9i or 10G on a real-time and/or batch mode to collect data through a web asp (active server page) screen that will be launched based upon the desktop version of Timekeep system on a quarterly basis to update the CAFM system. And included the following data elements will include: employee id, employee name, location information such as building, floor, room or cube number.	VI., 2.	1				
15	The vendor has proposed a system to provide automated procedures to update the data from the ORACLE tables to the CAFM system.	VI., 2.	1				
16	The vendor has provided contractor staff with the expertise and knowledge to customize portions of the software.	VI., 3.	1				
17	The vendor has provided a maintenance agreement, required for the proper upkeep of these custom routines and processes, as well as capability to expand them when necessary.	VI., 3.	1				
18	The vendor has provided a plan as to how they will customize and program support for all installed software packages. Does the software include programming language and menu changes, interfacing to other databases within ODJFS.	VI., 4.	1				
19	The vendor has confirmed they will obtain and maintain in full force and effect all required licenses, permits, and authorizations necessary to perform this contract.	VI., 5.	1				
20	The vendor has proposed an off-the-shelf Computer Aided Facility Management (CAFM) software, which links a space database and CAD floor plans to each other. The general minimum requirements for the CAFM system include, but may not be limited to the following modules: a. Property Portfolio Management b. Facilities Condition Monitoring c. Program/Project Management d. Lease Administration e. Space Management f. CAD Integration g. Planned Maintenance Management h. Demand Maintenance Management i. Web-enabled Work Request Management j. Asset Management k. Tools/Parts/Materials Management l. Facilities Purchase Requisitioning m. Move Management n. Facilities Document Management	VII., 1.	3				

	o. Operational Reporting and Modeling p. Health & Safety – Evacuation Plans and Emergency Assistance locations						
21	The vendor has provided a plan for installation and implementation of the system software, including configuration and customization work required to meet the business functions not supported by the off-the-shelf modules.	VII., 2.	2				
22	The vendor has provided a plan for data conversion from Drawbase database, MS Access, and MS Excel.	VII., 3.	2				
23	The vendor has provided documentation and training to allow system administrators and end-users the ability to properly operate the system on a day-to-day basis, including regular maintenance processes and the preparation of training materials to be used after implementation of the system is completed (contractor will provide initial product training for fifteen (15) ODJFS staff, and all training shall take place at an ODJFS Facility).	VII., 4.	1				
24	The vendor has provided a plan for telephone technical support to provide problem solving support for all installed software packages as specified. The contractor must support all technical questions by phone, e-mail, web, or fax between 8 a.m. and 6 p.m. Monday through Friday and must respond back to ODJFS within one (1) hour.	VII., 5.	1				
25	The vendor has provided a plan for on-site technical support as needed for troubleshooting, installation, configuration, data recovery, plotter setup, database administration, security group's setup or solving and other operations problem.	VII., 6.	1				
26	The vendor has provided a plan for post-implementation training and consulting visits for improving system implementation and increasing staff knowledge twice a year. The proposed training includes network configuration and administration, drawings and database development and customization, AUTODESK Architectural Desktop implementation and standardization, users and administrator training and system customizing, CAFM database import/export and application integration system consulting. The proposed has provided technical and customization training for all software packages previously specified.	VII., 7.	1				
27	The vendor has the vendor provided a standard software warranty at no cost to ODJFS.	VII., 8.	1				
Column Subtotal of "Partially Meets" points							
Column Subtotal of "Meets" points							
Column Subtotal of "Exceeds" points							
PHASE II TOTAL TECHNICAL SCORE: (The point value earned on each criterion is multiplied by that criterion's weight, then the sum of all those weighted scores is the Phase II score for the candidate.)							

Based upon the Grand Total Technical Score earned, does the vendor's proposal proceed to the Phase III evaluation of its Cost Proposal? (Vendor's Grand Total Technical Score must be at least 341 points.)

Yes _____

No _____

(If "No," Vendor's Cost Proposal will not be opened.)