

ATTACHMENT D
RLB#: R-89-04-8001
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 at the designated ODJFS location (as established in Section II. of this RLB) no later than the due date and time (as established in Sections II. and III. of this RLB)?	II, III		
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 RFP?	IX, A., Attach. A. & C.		
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 O. R.C. § 9.24.	IX, A., Attach. A. & C.		
4	ODJFS’ review of the Auditor of State website verifies that the vendor is not excluded from contracting with ODJFS by O. R.C. § 9.24 for an unresolved finding for recovery.	IX, A., Attach. A. & C.		
5	Does the vendor provide two (2) 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., I., a.		
6	Does the vendor proposal describe 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., I., b.		
7	Is the proposal <u>free of any</u> prohibited proprietary information/trade secrets and free of any prohibited personal confidential information on the vendor or subcontractor staff?	V. & IX., C.		

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 **328** points (a score which represents that it generally “meets” ODJFS expectations) out of a maximum of **420** 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 eight (8) years organizational experience.	V., 2., a.	2				
2	The vendor has provided background information 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., 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 1.7 million square feet of office space in various locations.	V., 2., b.	2				
4	The proposal must demonstrate that the vendor is able to use and has experience with AutoCAD as a drawing platform.	V., 2., c.	3				
STAFF EXPERIENCE AND CAPABILITIES							
5	The vendor has identified, by position and by name, those staff they consider key to the project's success.	V., 3., a	1				
6	The vendor has included resume(s) of key staff expected to work on the project.	V., 3., a	2				
7	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) at least four years' experience as a project manager with CAFM projects; 2) a working ability to prepare project plans with MS Project.	V., a., 1.	3				
8	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) At least two years experience with AutoCAD software 3) Is a Microsoft Windows Certified Engineer; and, 4) Will be available for assistance from contract effective date through post-implementation work.	V., a., 2.	3				
9	The vendor has designated a person to train staff in the use and maintenance of the CAFM software, with at least two years experience providing training for CAFM software.	V., a., 3	2				
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., b., 1. V., b., 2 V., b., 3	2				
ITEM #	PHASE II EVALUATION CRITERIA	RLB SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
SCOPE OF WORK/ SPECIFICATIONS OF DELIVERABLES							

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., A.	1				
12	The vendor has provided information on the following: a. Operating System characteristics b. Application Programming Language c. Network Software d. Communications Software e. Report Writer f. Database g. Browser h. CISCO network bandwidth requirement i. Back-up and Recovery Requirements j. Server Design Network Design – scalability, load balancing, fail over.	VI., A., 1 thru VI., A.,11	1				
13	The vendor’s proposal addresses security and client-server architecture requirements, including, at minimum, implementation using authentication via the State of Ohio’s Novell eDirectory based ID Vault, and, adherence to the thin client approach.	VI., C.	1				
14	The vendor has proposed a CAFM system with the ability to interface w/ ODJFS’ Timekeep system so that data changes can be incorporated into CAFM on a quarterly basis.	VI., B., 1	1				
15	The vendor has proposed a CAFM system with the ability to provide automated procedures to update the data from the ORACLE tables to the CAFM system.	VI., B., 2	1				
16	The vendor has proposed a CAFM system with the ability to utilize an AutoCAD drawing platform	VI., B., 3	1				
17	The vendor has proposed a plan to work with MIS, administrators, and staff to ensure that all modifications, installations, and customizations adhere to business standards and ODJFS approval.	VI., D.	1				
18	The vendor has proposed a plan to maintain in full force and effect all required licenses, permits, and authorizations. Subsequent to contract award. the contractor will supply ODJFS with evidence of all such licenses, permits and authorizations.	VI., E.	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.,E	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 CAFM system must include, at minimum, the following modules: a. Property & Lease Management b. Capital Budgeting c. Project Management d. Strategic Planning e. Space Management f. Overlay with Design Management for AutoCAD g. Move Management h. Reservations i. Hoteling j. Furniture & Equipment Management k. Help Desk – Work Orders l. Building Operations Management m. Emergency Preparedness & Life Safety n. Condition Assessment o. Environmental Sustainability Assessment p. MIS Supplied System Artifacts	VII., A., 1 Thru VII.,A.,16	3				
21	The vendor has provided a plan for installation and implementation of the system software, at minimum at four locations around the state and for 15 installations, including configuration and customization work required to meet the business functions not supported by the	VII., B.	2				

	off-the-shelf modules.						
22	The vendor has provided a plan for Data Transfer (e.g., lease specifications, vendor contact information, maintenance history, payment history, etc.) into the CAFM system.	VII., C.	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., D.	1				
24	The vendor has provided a plan for the operation and maintenance of the system until the implementation task has been successfully completed and the system has been transferred to the State. At minimum, this must include: 1.) Final data conversion 2.) Technical preparation and system changeover activities 3.) Development of an implementation activities check list 4.) Staffing requirements, by role and responsibility for all implementation activities 5.) Implementation schedule 6.) Activities required to effectively operate and maintain the system. The plan must include, but not limited to, staffing requirements by staff type and skill level and activities that must be preformed by each staff member.	VII., E.	1				
25	The vendor has provided a plan to provide troubleshooting 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 hour.	VII., F.	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. Training shall include network configuration and administration, drawings and database development and customization, AutoCAD implementation and standardization, users and administrator training and system customizing, CAFM database import/export and application integration system consulting. The Contractor must provide technical and customization training for all software packages previously specified.	VII., G.	1				
27	The vendor has provided a standard software warranty at no cost to ODJFS.	VII., H.	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 328 points.)

Yes _____

No _____

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