

**ATTACHMENT E**  
**RFP#: R-89-07-0004**  
**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 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?  | 1.6/5.1   |     |    |
| 2    | Did the vendor submit one (1) signed original and seven (7) paper copies and one (1) electronic copy of their Technical Proposal, as well as their Cost Proposal (in a separate sealed envelope labeled: “NOTE: DO NOT OPEN. COST PROPOSAL ENCLOSED FOR MEDICAID MANAGED CARE ENROLLMENT CENTER SERVICES FOR RFP#: R-89-07-0004 SUBMITTED BY [VENDOR’S NAME HERE].”)?  | 5.1   |     |    |
| 3    | Does the vendor’s proposal include all required affirmative statements and certifications, signed by the vendor’s responsible representative, as described in Attachment A, and Attachment C?  | 5.2 B. 1  |     |    |
| 4    | 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.  | 4.19<br>4.20  |     |    |
| 5    | 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.  | 4.18  |     |    |
| 6    | Does the vendor have a minimum of :<br>a. Five (5) years experience with public assistance programs which are affected by the managed care program;<br>b. Five (5) years general management experience, including operational, administrative, and budget/management;<br>c. Five (5) years experience in the managed health care and/or health care industry;<br>d. Five (5) years experience in operating a multi-county or statewide health care selection services contract; and,<br>e. Five (5) years experience in database analysis and electronic submission? | 2.1, A.<br>2.1, A.<br>2.1, A.<br>2.1, A.<br>2.1, A. |     |    |
| 7    | Has the vendor assigned a Project Manager that:<br>a. Is or shall be Ohio-based;<br>b. Shall be solely dedicated (100%) to the Medicaid MCEC Services contract;<br>c. Has at least one (1) year of continuous employment or partnership with the vendor prior to the vendor’s proposal submission and is not a subcontractor; and,<br>d. Has at least a baccalaureate degree.  | 2.1, B.<br>2.1, B.<br>2.1, B.<br>2.1, B.            |     |    |

**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 Ohio Health Plans. 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                         | 5                           | 10                | 15                   |
| 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 **2,355 points** (a score which represents that it “meets” all the evaluation criteria) out of a maximum of **3,715 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.         | Weight | Doesn’t Meet 0 | Partially Meets 5 | Meets 10 | Exceeds 15 |
|---|--|-----------------------|--------|----------------|-------------------|----------|------------|
| <b>REQ. VENDOR INFO. &amp; CERTIFICATIONS</b> |  |                       |        |                |                   |          |            |
| 1   | The vendor has included, properly completed and signed, the Req. Vendor Info. & Certifications as specified in the RFP.                          | 5.2, B., 1. Attach. A | 1      |                |                   |          |            |
| <b>VENDOR QUALIFICATIONS</b>                  |  |                       |        |                |                   |          |            |
| <b>MANDATORY VENDOR QUALIFICATIONS</b>        |  |                       |        |                |                   |          |            |
| 2   | The vendor has demonstrated at least five (5) years experience with public assistance programs which are affected by the managed care program.   | 2.1, A., 1.           | 4      |                |                   |          |            |
| 3   | The vendor has demonstrated at least five (5) years general management experience, including operational, administrative, and budget/management. | 2.1, A., 2.           | 8      |                |                   |          |            |

| ITEM #                                     | EVALUATION CRITERIA  | RFP SEC. REF. | Weight | Doesn't Meet 0 | Partially Meets 5 | Meets 10 | Exceeds 15 |
|--|--|---------------|--------|----------------|-------------------|----------|------------|
| 4  | The vendor has demonstrated at least five (5) years experience in the managed health care and/or health care industry.   | 2.1, A., 3.   | 4      |                |                   |          |            |
| 5  | The vendor has demonstrated at least five (5) years experience in operating a multi-county or statewide health care selection services contract.   | 2.1, A., 4.   | 8      |                |                   |          |            |
| 6  | The vendor has demonstrated at least five (5) years experience in database analysis and electronic submission.   | 2.1, A., 5.   | 8      |                |                   |          |            |
| 7  | The vendor's assigned Project Manager has at least one (1) year of continuous employment or partnership with the vendor prior to the vendor's proposal submission and is not a subcontractor.  | 2.1, B., 3.   | 4      |                |                   |          |            |
| 8  | The vendor's assigned Project Manager has at least a baccalaureate degree.   | 2.1, B., 4.   | 8      |                |                   |          |            |
| <b>ORG. EXPERIENCE &amp; CAPABILITIES</b>  |  |               |        |                |                   |          |            |
| 9  | The vendor has included information on the background of the firm, including any subcontractors, any prior experience relevant to this RFP; historical and current data regarding the vendor's size, organizational structure, and whether the vendor is local, regional, or national in scope.  | 2.2, A.       | 4      |                |                   |          |            |
| 10   | The vendor has provided samples of at least two (2), but no more than four (4), similar-sized projects completed in the past five (5) years that demonstrate expertise in or knowledge of the Ohio or other state Medicaid programs or other public payor programs and their service delivery systems.   | 2.2, B.       | 4      |                |                   |          |            |
| 11   | The vendor has included a vendor profile summary, in narrative format, which includes the vendor's experience in:<br>1.) Project design, development, and implementation; 2.) Management of a Medicaid managed care consumer education and community outreach and selection services program, including procedures and protocol development; and, 3.) Development and maintenance of databases, electronic data submission, and the preparation of statistical reports, including electronic communications.   | 2.2, C.       | 8      |                |                   |          |            |
| 12   | The vendor has included one letter of reference from each of three (3) different entities (excluding ODJFS) regarding work successfully performed and completed within the past five (5) years in regards to health care selection projects which are similar in size and scope to the work specified in this RFP. Each reference includes, at minimum:<br>1. Company name and address;<br>2. Contact person and phone number;<br>3. Project name, dates of employment; and,<br>4. Detailed descriptions of the scope of services provided that relates to the requirements of this RFP.                   | 2.2, D.       | 8      |                |                   |          |            |
| <b>STAFF EXPERIENCE &amp; CAPABILITIES</b> |  |               |        |                |                   |          |            |
| 13   | The vendor has identified, by position and by name, those staff the vendor considers key to the project's success (at minimum, key staff identified must include a project manager).   | 2.3, A.       | 8      |                |                   |          |            |
| 14   | The vendor has included resume(s), education, experience and a list of related published works of the project manager and all key personnel for this project (including any subcontractors), and specifically listed their qualifications and experience in the areas described in Section III (Scope of Work and Specifications of Deliverables) of this RFP.   | 2.3, B.       | 8      |                |                   |          |            |
| 15   | The vendor has assigned a Project Manager to the MCEC Services project who has at least three (3) years experience with state-level public health care assistance programs particularly in the area of managed care.   | 2.3, C., 1.   | 4      |                |                   |          |            |
| 16   | The vendor has assigned a Project Manager to the MCEC Services project who has at least five (5) years general management experience, including operational, administrative, and budget/management experience.   | 2.3, C., 2.   | 8      |                |                   |          |            |
| 17   | The vendor has assigned a Project Manager to the MCEC Services project who has at least five (5) years experience in managed care and/or health care-related industries in the areas of enrollment/selection services.   | 2.3, C., 3.   | 8      |                |                   |          |            |
| 18   | The vendor has provided a Project Manager Profile Summary which includes, at minimum, a statement that the assigned project manager is currently based or will be based in Ohio if awarded the resulting contract and shall dedicate 100% of the project manager's time to the MCEC Services contract.   | 2.3, D.       | 8      |                |                   |          |            |
| 19   | The vendor has provided three (3) letters of reference (from sources other than ODJFS) that document the proposed project manager has successfully performed project management services, including planning and implementation, or that support the proposed PM's skills, training, and ability to perform such work. Each reference includes, at minimum:<br>1. Company name and address;<br>2. Contact person and phone number;<br>3. Project name, dates of employment; and,<br>4. Detailed descriptions of the proposed PM's skills and qualifications that relate to the work described in this RFP. | 2.3, E.       | 8      |                |                   |          |            |

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|---------------------------------------|--|---------------|--------|----------------|-------------------|----------|------------|
| <b>SCOPE OF WORK</b>                  |  |               |        |                |                   |          |            |
| 20                                    | The vendor has provided a plan to locate and lease space for the selection services telephone center, which must be located in the Columbus metropolitan area.   | 3.2 B., 1.    | 8      |                |                   |          |            |
| 21                                    | The vendor has provided a plan to provide office furnishings and equipment including, but not limited to: telephone systems, word processors, personal computers, laptops, including necessary support systems both hardware and software, and fax and copying equipment necessary for the successful completion of work as specified in the RFP.                    | 3.2 B., 2.    | 8      |                |                   |          |            |
| 22                                    | The vendor has provided a plan to hire qualified personnel as specified in Section 2.3 of this RFP.  | 3.2 B., 3.    | 8      |                |                   |          |            |
| 23                                    | The vendor has provided a plan to design a training curriculum to address key concepts of managed care and the Ohio Medicaid managed care program, industry trends, laws, as well as impart effective customer relations skills, cultural sensitivity, and all contractor's policy and procedures developed to implement Objectives 1-10 as outlined in Section 1.5. | 3.2 B., 4.    | 4      |                |                   |          |            |
| 24                                    | The vendor has provided a plan to purchase of SecurID tokens for applicable employees (usually outreach staff) for the purpose of accessing CRIS-E.  | 3.2 B., 5.    | 4      |                |                   |          |            |
| 25                                    | The vendor has provided a plan to extend no less than basic health care coverage to all its employees.   | 3.2 B., 7.    | 2      |                |                   |          |            |
| 26                                    | The vendor has provided a plan that assures that all outreach staff wear identification at all times.  | 3.2 B., 8.    | 2      |                |                   |          |            |
| <b>SPECIFICATIONS OF DELIVERABLES</b> |  |               |        |                |                   |          |            |
| 27                                    | The vendor has provided a plan to implement and maintain an ODJFS-approved MCEC management information system (MIS) to accept eligible individual information provided by ODJFS as specified in the RFP.   | 3.3, A., 1.   | 3      |                |                   |          |            |
| 28                                    | The vendor has provided a plan to utilize their MIS to enter and maintain consumer contact, initial selection, selection change, assignment, CIC, BCMH, SSI, Exemptions, Transition of Membership, and Just Cause request data as specified in the RFP.  | 3.3, A., 2.   | 3      |                |                   |          |            |
| 29                                    | The vendor has provided a plan to utilize the MIS to generate selection data on a monthly and ad hoc basis as specified in the RFP.  | 3.3, A., 3.   | 2      |                |                   |          |            |
| 30                                    | The vendor has provided a plan to immediately resolve MIS failures and report those failures to ODJFS.   | 3.3, A., 4.   | 2      |                |                   |          |            |
| 31                                    | The vendor has provided a plan to implement and maintain the consumer selection telephone center with a toll-free telephone system solely dedicated to the MCEC Services contract that is capable of accepting all telephone calls from eligible consumers as specified in the RFP.  | 3.3, B., 1.   | 3      |                |                   |          |            |
| 32                                    | The vendor has provided a plan to maintain phone system capability to refer or warm transfer callers (person-to-person) to MCP member services, ODJFS or the local CDJFS, as appropriate and as specified in the RFP.  | 3.3, B., 2.   | 2      |                |                   |          |            |
| 33                                    | The vendor has provided a plan to maintain the required standards in the operation of the MCEC telephone system and center as specified in the RFP.  | 3.3, B., 3.   | 3      |                |                   |          |            |
| 34                                    | The vendor has provided a plan to immediately resolve phone system failures and report those failures to ODJFS.  | 3.3, B., 4.   | 2      |                |                   |          |            |
| 35                                    | The vendor has provided a plan to implement and provide health care selection and assignment services as appropriate to all Aged, Blind or Disabled (ABD) and Covered Families and Children (CFC) eligibles in the Ohio Medicaid managed care program as specified in the RFP.   | 3.3, C., 1.   | 2      |                |                   |          |            |
| 36                                    | The vendor has provided a plan to inform and assist eligibles who contact the MCEC about selecting a health care option for themselves and other members of their AG as specified in the RFP.  | 3.3, C., 2.   | 2      |                |                   |          |            |
| 37                                    | The vendor has provided a plan to implement and maintain health care selection procedures in accordance with HIPAA and ODJFS policy as specified in the RFP.   | 3.3, C., 3.   | 2      |                |                   |          |            |
| 38                                    | The vendor has provided a plan to utilize ODJFS-approved procedures to guide eligibles through the health care selection process as specified in the RFP.  | 3.3, C., 4.   | 2      |                |                   |          |            |
| 39                                    | The vendor has provided a plan to assign to an MCP those eligibles in mandatory selection counties or regions who fail to voluntarily choose an MCP as specified in the RFP.   | 3.3, C., 5.   | 2      |                |                   |          |            |
| 40                                    | The vendor has provided a plan to implement and provide consumer education and community outreach services as appropriate to all participating eligible populations and interested community stakeholders as specified in the RFP.   | 3.3 D., 1.    | 2      |                |                   |          |            |
| 41                                    | The vendor has provided a plan to implement and provide ODJFS-approved consumer education as appropriate to all participating eligible populations as specified in the RFP.  | 3.3, D., 2.   | 2      |                |                   |          |            |
| 42                                    | The vendor has provided a plan to implement and provide community outreach services, as appropriate, to community stakeholders as specified in the RFP.  | 3.3, D., 3.   | 2      |                |                   |          |            |

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|--|--|-----------------|--------|----------------|-------------------|----------|------------|
| 43   | The vendor has provided a plan to implement and maintain procedures for the daily electronic data entry of initial selection, change, and assignment transactions in ODJFS' CRIS-E as specified in the RFP.  | 3.3, E., 1.     | 3      |                |                   |          |            |
| 44   | The vendor has provided a plan to receive and correct a daily error report listing all data entries CRIS-E would not accept as specified in the RFP.   | 3.3, E., .2.    | 2      |                |                   |          |            |
| 45   | The vendor has provided a plan to maintain a 90% accuracy rate of applicable selection information and CRIS-E data entry as specified in the RFP.  | 3.3 E., 3.      | 2      |                |                   |          |            |
| 46   | The vendor has provided a plan to provide MCPs with selection confirmations, containing all information fields on the CCR file format in text delimited ASCII file format once CRIS-E data entry is completed as specified in the RFP.   | 3.3, E., 4.     | 2      |                |                   |          |            |
| 47   | The vendor has provided a plan to implement and maintain procedures to process Children in Custody (CIC), Bureau of Children with Medical Handicaps (BCMh), or Social Security Income (SSI) exemption requests as specified in the RFP.  | 3.3, F., 1.     | 3      |                |                   |          |            |
| 48   | The vendor has provided a plan to implement and maintain ODJFS-developed procedures related to Transition of Membership issues and Just Cause requests as specified in the RFP.  | 3.3, G., 1.     | 3      |                |                   |          |            |
| 49   | The vendor has provided a plan to implement and maintain procedures to receive and act upon contractor complaints or forward non-contractor complaints to the correct party as specified in the RFP.   | 3.3, H., 1.     | 2      |                |                   |          |            |
| 50   | The vendor has provided a plan to record and forward to ODJFS, complaints made against the MCPs and/or their providers as well as maintaining a record of all complaints received as specified in the RFP.   | 3.3, H., 2 & 3. | 2      |                |                   |          |            |
| 51   | The vendor has provided a plan to implement and maintain procedures to measure consumer satisfaction as specified in the RFP.  | 3.3, I., 1.     | 2      |                |                   |          |            |
| 52   | The vendor has provided a plan to evaluate consumer satisfaction data and utilize information to improve enrollment center and continuous staff development as specified in the RFP.   | 3.3, I., 2.     | 2      |                |                   |          |            |
| 53   | The vendor has provided a plan to transmit MCP health care selection data to ODJFS electronically as directed by ODJFS and as specified in the RFP.  | 3.3, J., 1.     | 2      |                |                   |          |            |
| 54   | The vendor has provided a plan to generate and provide to ODJFS statistical and analytical reports in electronic format on a monthly and ad hoc basis as specified in the RFP.   | 3.3, J., 2.     | 2      |                |                   |          |            |
| <b>ADMIN. STRUCTURES-PROP. WORK PLAN</b>           |  |                 |        |                |                   |          |            |
| 55   | The vendor has stated the key objectives of the <u>proposed</u> project and has not simply restated the objectives as identified in this RFP.  | 3.4, .A.        | 8      |                |                   |          |            |
| 56   | The vendor has provided a technical approach and work plan to be implemented.  | 3.4, B.         | 4      |                |                   |          |            |
| 57   | The vendor has provided a status reporting procedure for reporting work completed, and resolution of unanticipated problems.   | 3.4, C.         | 4      |                |                   |          |            |
| 58   | The vendor has provided a current organizational chart (including any subcontractors) and has specified the key management and administrative personnel who will be assigned to this project.  | 3.4, D.         | 4      |                |                   |          |            |
| 59   | The vendor has provided a timeline for each component of the scope of work and the overall project which includes at least two on-site inspections by ODJFS; a preliminary walk through June 15, 2007, and the final inspection of staff and equipment [including telephone and Management Information System (MIS)] on June 27, 2007 and including the staff hours for personnel involved.  | 3.4, E.         | 4      |                |                   |          |            |
| 60   | The vendor has included a Table of Organization (including any consultants/subcontractors) which:<br>1. Delineates for each position (including consultants/sub-contractors) the number of full time employees (FTEs), and the position and FTE for any vendor executive personnel affiliated with the ongoing maintenance of the project;<br>2. Includes a chart showing the number of hours devoted to the project by vendor or sub-contractor staff and the percentage of time each key management person will devote to the project; and,<br>3. Includes a position description for each position on the TO that demonstrates qualifications and experience (specified in Section II.) necessary to successfully complete the work as delineated in Section III. | 3.4, F.         | 4      |                |                   |          |            |
| <b>Column Subtotal of "Partially Meets" points</b> |  |                 |        |                |                   |          |            |
| <b>Column Subtotal of "Meets" points</b>           |  |                 |        |                |                   |          |            |
| <b>Column Subtotal of "Exceeds" points</b>         |  |                 |        |                |                   |          |            |
| <b>GRAND TOTAL SCORE:</b>                          |  |                 |        |                |                   |          |            |

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 2,355 points.)

Yes \_\_\_\_\_

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