

ATTACHMENT D
RLB#: R-89-07-0924
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	RLB Section Reference	YES	NO
1	Was the vendor’s proposal received by the deadline and at the location specified in Section III. the RLB?	III. VI., A., 1.		
2	Did the vendor submit one original and five (5) paper copies and one electronic copy of their Technical Proposal labeled: “TECHNICAL PROPOSAL ENCLOSED FOR MFP QUALITY OF LIFE SURVEY SERVICES PROJECT, RLB#: R-89-07-0924 SUBMITTED BY (VENDOR NAME AND DATE OF SUBMISSION)” ?	VI., A., 2.		
3	Did the vendor submit three (one signed original and two copies) copies of the Cost Proposal <u>in a separate, sealed envelope</u> , and labeled: “NOTE: DO NOT OPEN. COST PROPOSAL ENCLOSED FOR MFP QUALITY OF LIFE SURVEY SERVICES PROJECT, RLB#: R-89-07-0924 SUBMITTED BY (VENDOR NAME AND DATE OF SUBMISSION).” ?	VI., A., 3.		
4	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 C to the RLB?	VI., A., 4. Attach. A.		
5	Included in those certifications, has 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?	VI., A., 5. XII., M. Attach. A.		
6	Has ODJFS’ review of the Auditor of State website verified that the vendor is not excluded from contracting with ODJFS by R.C. § 9.24 for an unresolved finding for recovery?	VI., A., 6. XII., K. Attach. A.		
7	Has the vendor demonstrated at least five (5) years experience in performing survey development, analysis and reporting and has submitted a detailed written cover letter of the vendor’s experience during the last five (5) years which includes, but not limited to, historical and current data regarding the vendor’s size, organizational structure, and whether the vendor is local, regional, or national organization?	VI., A., 7.		
8	Demonstrated at least five (5) years experience with data collection, storage and disposition;	VI., A., 8.		
9	Has the vendor demonstrated at least three (3) years experience in working with consumer and advocacy groups and other alliance building activities?	VI., A., 9.		
10	Did the vendor assign a Project Manager (PM) to the project who meets the qualification standards established by the Project Management Institute (PMI) to be a certified project manager; and who has had at least three (3) years experience on projects of similar size and scope –AND- Has the vendor supplied documentation of project management certification and date when assigned PM achieved his or her PMI certification?	VI.,A., 10.		

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 RLB, 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 **406** points (a score which represents that it “meets” all the evaluation criteria) out of a maximum of **528** 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	RLB SEC. REF.	Weighting	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
REQ. VENDOR INFO. & CERTIFICATIONS							
1	The vendor has included, properly completed and signed, the Required Vendor Information & Certifications as specified in the RLB.	VI., A., 4. Attach. A.	1				
VENDOR QUALIFICATIONS							
MANDATORY VENDOR QUALIFICATIONS							
2	The vendor has demonstrated at least five (5) years experience in performing survey development, analysis and reporting and has submitted a detailed written cover letter of the vendor's experience during the last five (5) years which includes, but not limited to, historical and current data regarding the vendor's size, organizational structure, and whether the vendor is local, regional, or national organization.	VI., A., 7.	2				
3	The vendor has demonstrated at least five (5) years experience with data collection, storage and disposition.	VI., A., 8.	2				
4	The vendor has demonstrated at least three (3) years experience in working with consumer and advocacy groups and other alliance building activities.	VI., A., 9.	3				
5	The vendor has assigned a Project Manager to the project who meets the qualification standards established by the Project Management Institute (PMI) to be a certified project manager; and who has had at least three (3) years experience on projects of similar size and scope –AND- has supplied documentation of project management certification and date when assigned PM achieved his/her PMI certification.	VI.,A., 10.	1				
ORGANIZATIONAL EXPERIENCE & CAPABILITIES							
6	The vendor has provided documentation of the vendor's experience in the design, implementation and evaluation of similar types of projects and has included descriptions of at least two, but no more than four, similar-sized projects completed in the past five (5) years that demonstrate expertise in performing survey development, analysis and reporting.	VI., B., 1.	1				
7	The vendor has demonstrated understanding of the Ohio Medicaid program.	VI., B., 2.	1				
8	The vendor has demonstrated an understanding of HIPAA regulations as they relate to participants in the Ohio Medicaid program regarding record retention and destruction as well as having appropriate safeguards in place to assure the security and confidentiality of survey subjects.	VI., B., 3.	2				
9	The vendor has provided names and contact information for at least three entities, other than ODJFS, for which the vendor has performed similar scale projects for in the past five (5) years –AND- has provided the following information about each project: a. Company name and address; b. Contact person and phone number; c. Project name and time span; and, d. A detailed description of the scope of services provided that relate to the requirements of this RLB.	VI., B., 4.	2				
STAFF EXPERIENCE & CAPABILITIES							
10	The vendor has identified by position and by name, those staff the vendor considers to be key to the project's success and who will be assigned to this project.	VI., C., 1.	1				
11	The vendor has identified and assigned an individual as the Project Manager (PM) for the duration of this project –AND- has demonstrated that the PM possesses, at minimum, a graduate degree in statistics, public health, economics, political science, sociology, computer science, or other quantitatively oriented discipline, and at least three (3) years experience performing survey research and who meets the qualification standards established by the Project Management Institute (PMI) to be a certified project manager for the previous three (3) years; and who has had at least three years experience on projects of similar size and scope; and at least three (3) years experience with social marketing and communications methods such as newsletters, public service announcements, community forums, etc.	VI., C., 2.	1				
12	The vendor has included a resume or curriculum vitae for the assigned PM as well as any key staff expected to work on the project.	VI., C., 3.	1				
13	The vendor has identified and assigned staff member(s) who will be responsible for training survey administrators and who will complete formal training administered by ODJFS or their designee.	VI., C., 4.	1				
14	The vendor has demonstrated that the surveyor possesses, at minimum, previous experience communicating and interacting with seniors and persons with disabilities.	VI., C., 5.	3				

ITEM #	EVALUATION CRITERIA	RLB SEC. REF.	Weighting	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
15	The vendor has identified protocols in place to protect the confidentiality, health and safety of the survey subjects, including procedures for completion of BCII criminal background checks of all interviewers/key staff and appropriate confidentiality agreements as required by ODJFS.	VI., C., 6.	3				
SCOPE OF WORK							
Survey Training							
16	The vendor has provided a plan to ensure that the vendor's assigned trainees/key staff attend and complete formal training and any additional training, as needed, administered by ODJFS or their designee prior to performing survey services.	VII., A.	2				
Survey Implementation							
17	The vendor has provided a plan to administer the required survey, up to two (2) times per program participant over thirteen (13) month intervals during the five year period of the demonstration, to up to 2231 program participants, and submitting the completed surveys to ODJFS for review and approval in the required format as determined by ODJFS.	VII., B. 1.	3				
18	The vendor has provided a plan to make contact with the participant to arrange the first of two follow-up interviews.	VII., B. 1. a.	3				
19	The vendor has provided a plan to conduct the required interviews using the following schedule: 1). "First follow-up": About 11 months after the participant is discharged to the community, which for most enrollees will be shortly before their 365-day MFP participation period ends; and, 2). "Second follow-up": About 24 months after the participant is discharged to the community.	VII., B. 1., a., 1). & 2).	3				
20	The vendor has provided a statement that they, prior to receipt of the program participant's information, will sign an initial "Attestation Statement" from ODJFS (see Appendix D) which affirms that the vendor's representative agrees to safeguard the participant's information, and ensures that the vendor representative has undergone HIPAA training and provides evidence that their background check has been satisfactorily completed.	VII., B. 1.	1				
Survey Reporting Requirements							
21	The vendor has provided a plan to submit required and completed surveys to ODJFS in the format as specified by ODJFS.	VII., C.	3				
Administrative Requirements							
22	The vendor has provided an affirmation that if awarded the resulting contract that they shall provide to ODJFS QoL vendor procedures consistent with grant requirements as specified in Section VII., D., 1. and 2. following initial training by ODJFS and within 30 days of contract initiation.	VII., D., 1. and 2.	1				
Compliance Requirements							
23	The vendor has provided an affirmation that if awarded the resulting contract that they shall adhere to all General Terms and Conditions (provided as Appendix E) of the MFP Demonstration Grant provided to ODJFS by CMS or MPRI regarding the surveys.	VII., E., 1.	1				
24	The vendor has provided an affirmation that if awarded the resulting contract that they shall adhere to performance metrics and monitoring to be specified by ODJFS.	VII., E., 2.	1				
25	The vendor has provided an affirmation that if awarded the resulting contract that they shall comply with Ohio's incident reporting requirements in accordance with the applicable Ohio Administrative Code 173-39-02, 5101:3-12-29 and 5123:2-17-02 when the surveyor becomes aware of issues related to the suspected, alleged and/or actual circumstances involving the abuse, neglect and exploitation of Ohio's HOME Choice participants.	VII., E., 3.	1				
SPECIFICATIONS OF DELIVERABLES							
26	The vendor has provided a plan to (upon successful completion of training and receipt by ODJFS of interviewer signed "Attestation Statement") administer and submit to ODJFS Contract Manager, both electronically and original signed hard copy, completed <u>follow-up surveys</u> of at least 85 percent of those who completed the baseline interview.	VIII., B.	3				
27	The vendor has provided a plan to administer and submit to ODJFS Contract Manager, both electronically and original signed hard copy, completed <u>second follow-ups</u> with at least 75 percent of those completing the baseline.	VIII., C.	3				
28	The vendor has provided a plan to deliver in an electronic format specified by ODJFS, a summary of responses for the surveys completed in the billing periods and project to date on a quarterly basis.	VIII., D.	3				

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Column Subtotal of "Partially Meets" points							
Column Subtotal of "Meets" points							
Column Subtotal of "Exceeds" points							
GRAND TOTAL SCORE:							

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 406 points.)

Yes _____

No _____

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