

ATTACHMENT E
RFP#: R-89-07-0931
Technical Proposal Score Sheet

PHASE I: Initial Qualifying Criteria

Vendor 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?	1.6/5.1		
2	Did the vendor submit a proposal comprised of a Technical Proposal and, in a separate, appropriately labeled, sealed envelope, a Cost Proposal?	5.1		
3	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?	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 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	Has the vendor included an affirmation that they do not have any direct business relationship with any Medicaid managed care plans as listed in Appendix I ?	4.25		
7	Is the vendor, or will the vendor subcontract with, a National Committee for Quality Assurance (NCQA)-certified Consumer Assessment of Healthcare Providers and Systems (CAHPS) vendor?	1.1 2.1, A.		
8	Is the vendor, a member of its staff, or will the vendor subcontract with, an NCQA-Certified Healthcare Effectiveness and Data Information Set (HEDIS) Compliance Auditor?	1.1 2.1, B.		
9	Does the vendor have a minimum of five (5) years experience performing external quality review activities?	1.1 2.1, C.		
10	Does the vendor have key staff proposed for the project which have demonstrated quality improvement experience and knowledge of Medicaid programs and managed care delivery systems? This means that the proposed key staff have experience with the following: 1. Medicaid beneficiaries, policies and data systems; 2. Managed care delivery systems, organizations, and financing; 3. Quality assessment and performance improvement methods; and, 4. Research design, methods, and statistical analysis.	1.1 2.1, D.		
11	Does the vendor have the information technology capacity that is adequate for receiving, manipulating, analyzing, and transferring large data sets, covering a population of over 1.5 million eligibles, on a minimum monthly basis?	1.1 2.1, E.		
12	Did the vendor assign and specify to this project a Project Director, and a sufficient number of Project Manager(s), Health Data Analyst(s), Information Systems Manager(s), programmer(s)/developer(s), and/or Database Administrator(s) who have at least a bachelor’s degree with at least three (3) years of health care related experience?	2.3, H.		
13	Did the vendor provide this information for each activity in Section 3.4. including the percentage of staff time or FTEs that will be devoted to each activity?	2.3, H.		
14	Did the vendor demonstrate in their proposal the capability to correspond the hours worked by the employee with the designated FTE allocation for that employee by deliverable?	2.3, H.		

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	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 **2,130** points (a score which represents that it “meets” all the evaluation criteria) out of a maximum of **2,738** 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	Partially Meets	Meets	Exceeds	Ext.
				0	6	8	10	
REQ. VENDOR INFO. & CERTIFICATIONS								
1	The vendor has included, properly completed and signed, the Required Vendor Information & Certifications as specified in the RFP.	5.2, B., 1.	.5					
VENDOR QUALIFICATIONS								
MANDATORY VENDOR QUALIFICATIONS								
2	a) The vendor has demonstrated that they are, or will subcontract with, an NCQA-certified CAHPS vendor.	1.1, A. 2.1, A.	2a) 2					
	b) The vendor has provided a statement that they and, if applicable, their subcontractor will seek certification or re-certification annually.		2b) 2					
3	The vendor has demonstrated that they are, have on staff, or will subcontract with, an NCQA-certified HEDIS Compliance Auditor.	1.1, B. 2.1, B.	4					
4	The vendor has demonstrated that they have a minimum of five (5) years experience performing external quality review activities.	1.1, C. 2.1, C.	4					
5	a) The vendor has demonstrated that they have key staff proposed, or will subcontract with a qualified organization. This means that the proposed key staff have experience with the following:	1.1, D. 2.1, D.	5a) 1					
	b) The proposed key staff have demonstrated and quality improvement experience and knowledge of Medicaid programs and managed care delivery systems.		5b) 1					
	c) The proposed key staff have experience with Medicaid beneficiaries, policies and data systems;		5c) 1					
	d) The proposed key staff have experience Managed care delivery systems, organizations, and financing;		5d) 1					
	e). The proposed key staff have experience Quality assessment and performance improvement methods; and,		5e) 1					
	f) The proposed key staff have experience Research design, methods, and statistical analysis.		5f) 1					
6	The vendor has the information technology capacity that is adequate for receiving, manipulating, analyzing and transferring large data sets, covering a population of over 1.5 million eligibles on a minimum monthly basis.	1.1, E. 2.1, E.	4					
ORGANIZATIONAL EXPERIENCE & CAPABILITIES								
7	The vendor has provided a brief description of the organization's history and current operations in Ohio and the United States, including any subcontractors (per Sections 4.8 and 4.9).	2.2, A.	2					
8	a) The vendor has provided a statement that it has the capacity to maintain the data files provided by ODJFS.		a) 2					
	b) The vendor will use the appropriate software to assure file exchange with ODJFS.		b) 2					
9	The vendor has demonstrated at least five years experience working with state Medicaid programs (Displayed both the total number of corporate years and the total number of staff years, separately).	2.2, B.	2					
10	The vendor has provided identification of at least two, but no more than four, state programs in which the vendor has undertaken major policy development activities for the health care delivery system, including technical assistance related to quality improvement program evaluation and development within the past five years (Previous projects related to the delivery of health care services are of particular interest).	2.2, C.	2					
11	The vendor has provided, for each state listed in Sec. 2.2, C., (above), a brief description of: (a) the length and dates of the contract; (b) the staff allocated; (c) the work undertaken; and, (d) the deliverables produced and has specified whether or not all deliverables described in the contract's scope of services were produced and has provided a contact person for the state agency who has knowledge of the work performed for that respective state.	2.2, D.	2					
12	The vendor has provided at least two, but no more than four, examples of any documents that have been prepared for state Medicaid agencies or other purchasers, regulators, and health care systems to explicitly and consistently measure and evaluate the quality of care delivered.	2.2, E.	2					
13	a) The vendor has demonstrated at least five years experience providing technical assistance related to quality improvement, assurance, and program evaluation to State Medicaid programs.	2.2, F.	a) 1.5					
	b) The vendor has identified the states and has provided a description of the projects.		b) .5					
14	The vendor has demonstrated at least five years experience with data retrieval and medical record audits for state Medicaid agencies or other purchasers, regulators and health care systems.	2.2, G.	2					
15	The vendor has demonstrated at least five years experience with encounter data validation reviews that compare services documented in the medical records of members to corresponding encounters in administrative data.	2.2, H.	4					

ITEM #	EVALUATION CRITERIA	RFP SEC. REF.	Weight	Doesn't Meet	Partially Meets	Meets	Exceeds	Ext.
				0	6	8	10	
16	a) The vendor has demonstrated at least five years experience conducting consumer-focused case studies.	2.2, I.	a) 1					
	b) The vendor has provided in its description: information about developing the survey instrument; methods for data collection; and analysis and the reporting of results.		b) 1					
17	a) The vendor has demonstrated at least five years experience conducting quality of life studies.	2.2, J.	a) 1					
	b) The vendor has provided in its description: information about developing the survey instrument; methods for data collection and analysis; and the reporting of results.		b) 1					
18	a) The vendor has demonstrated at least five years experience conducting administrative compliance audits.	2.2, K.	a) 2					
	b) The vendor has provided in its description: information about desktop reviews; on-site audits; forms used to evaluate compliance; and reporting of results.		b) 2					
19	a) The vendor has demonstrated at least five years experience conducting or validating performance improvement projects.	2.2, L.	a) 1					
	b) The vendor has provided in its description: information about tools used to either conduct or validate projects; project types (e.g., clinical or administrative); and how results were shared with the state or other purchaser.		b) 1					
20	a) The vendor has demonstrated at least five years experience reviewing and auditing health care provider information systems.	2.2, M.	a) 1					
	b) The vendor has provided in its description: information about tools and staff used to audit the systems; types of systems reviewed (e.g., MCP, hospital, individual provider level, state agency, etc.). and information about any technical assistance that was provided to the state or purchaser to address findings from the audit.		b) 1					
21	a) The vendor has demonstrated at least five years experience analyzing HEDIS audited data.	2.2, N.	a) 1					
	b) The vendor has provided in its description: information about how data was collected/received; software used to analyze data; and any experience producing comparative reports based upon the data.		b) 1					
22	a) The vendor has demonstrated at least five years experience identifying, developing and analyzing performance measures using nationally known algorithms or measures (e.g., HEDIS and CMS) or state-specific measures.	2.2, O.	a) 2					
	b) The vendor has provided in its description: complex and large data exchange/storage/update/capacity, Medicaid or health data system management, statistical software and programming (SAS), benchmarking, and experience producing public reports, report cards, ad hoc analysis, technical assistance, clinical consultation, policy recommendations, and quality improvement strategies.		b) 2					
23	a) The vendor has demonstrated at least five years experience with CAHPS survey development and administration, experience conducting Medicaid consumer satisfaction surveys, strategies to increase response rates, and the submission of data to both NCQA and the NCBD.	2.2, P.	4					
24	The vendor has demonstrated at least five years research experience that focuses upon special needs populations (e.g., ABD).	2.2, Q.	2					
25	a) The vendor has demonstrated at least five years experience conducting pharmacy program reviews.	2.2, R.	a) 1					
	b) The vendor has provided in its description information about tools used to review the programs and how findings were presented to the state or purchaser.		b) 1					
26	a) The vendor has demonstrated at least five years experience with developing and implementing tracking databases.	2.2, S.	a) 1					
	b) The vendor has provided in its description information regarding the completion of a needs assessment for the client, the type of database construction, and the transition plan from the vendor to the state or purchaser.		b) 1					
27	a) The vendor has demonstrated at least five years experience with facilitating collaborative partnerships between multiple stakeholders	2.2, T.	a) 1					
	b) The vendor has provided in its description method(s) employed to facilitate dialogue, the type of topics, outcome of the collaborative and how information was presented to the state or purchaser.		b) 1					
28	a) The vendor has demonstrated at least five years experience conducting program evaluations for health care related projects, policies, or programs to determine effectiveness.	2.2, U.	a) 1					
	b) The vendor has provided in its description methods employed for the program evaluation, type of topics, outcome of evaluation, and how information was presented to state or purchaser.		b) 1					

ITEM #	EVALUATION CRITERIA	RFP SEC. REF.	Weight	Doesn't Meet	Partially Meets	Meets	Exceeds	Ext.
				0	6	8	10	
29	The vendor has demonstrated at least five years experience with producing the EQR Technical Report as specified in 42 Code of Federal Regulations (CFR) 438.358.	2.2, V.	2					
STAFF EXPERIENCE & CAPABILITIES								
30	a) The vendor has: provided the number of executive and professional personnel, management analysts, programmers, consultants, etc. who will be employed in the work.	2.3, A.	a) 3					
	b) The vendor has indicated where these personnel will be physically located in Ohio during the time they are engaged in the work.		b) 3					
31	The vendor has provided resumes, education, experience and a list of related published works for key management personnel that will be assigned to this project [key management personnel include the project director, project manager(s), medical director, health data analyst(s), statistician(s), technical writer(s), systems analyst(s), programmer(s)/developer(s), information system manager(s), and data base administrator(s)].	2.3, B.	3					
32	a) The vendor has assigned and specified to the project one or more statisticians with at least a Master's degree in Statistics, Mathematics or Bio-Statistics, or a PhD in a related field	2.3, C.	a) 1.5					
	b) The vendor has at least three (3) years experience drawing complex stratified samples and weighting results.		b) 1.5					
33	The vendor has assigned and specified to the project one or more Technical Writers with at least three (3) years of experience writing health care related reports.	2.3, D.	3					
34	a) The vendor has assigned and specified one or more Systems Analysts to the project who has completed an undergraduate program in information technology, or a related field.	2.3, E.	a) .75					
	b) The vendor has a Systems Analyst have a Master's Degree in Computer Science or a related field, a minimum of four (4) years of experience with various database management systems, SAS programming languages, and with auditing system edits and data integration procedures.		b) 1.5					
	c) The vendor has an analyst with 24 months of experience with Medicaid information systems.		c) .75					
35	a) The vendor has assigned and specified to the project a Medical Director who is a licensed Medical Doctor (M.D.) or Doctor of Osteopathy (D.O.).	2.3, F.	a) 1.5					
	b) The vendor has a Medical Director with at least three (3) years of experience with behavioral health care.		b) 1.5					
36	The vendor has assigned and specified to the project a licensed Pharmacist who has at least three (3) years of health care related experience.	2.3, G.	3					
37	a) The vendor has assigned and specified to this project a Project Director, and a sufficient number of Project Manager(s), Health Data Analyst(s), Information Systems Manager(s), programmer(s)/developer(s), and/or Database Administrator(s) who have at least a bachelor's degree with at least three (3) years of health care related experience.	2.3, H.	a) 3					
	b) The vendor has completed this for each activity in Section 3.4. including: the percentage of staff time or FTEs that will be devoted to each activity; and the vendor's capability to correspond the hours worked by the employee with the designated FTE allocation for that employee by deliverable.		b) 3					
38	a) The vendor has identified key management positions which shall be located in Ohio.	2.3, I.	a) 3					
	b) The vendor has provided a statement that key management personnel assigned to the project will not be reassigned by the vendor without prior notification to ODJFS.		b) 3					
39	The vendor has provided a written statement, stating whether or not the vendor will purchase the services of a qualified subcontractor for any of the activities/deliverables in Section 3.4. And if yes, the vendor has included a statement that the vendor will be responsible for the quality and timeliness of all deliverables performed by the subcontractor.	2.3, J.	3					
SCOPE OF WORK [Each criterion will be scored on the presence (2 weight) and appropriateness (2 weight) of the plan.]								
40	The vendor has provided a plan to develop evaluation methodologies for the EQR activities.	3.1, A.	2					
			2					
41	The vendor has provided a plan to perform data collection and analysis.	3.1, B.	2					
			2					
42	The vendor has provided a plan to prepare plan-specific and aggregate reports presenting the findings and recommendations.	3.1, C.	2					
			2					

ITEM #	EVALUATION CRITERIA	RFP SEC. REF.	Weight	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10	Ext.
43	The vendor has provided a plan to provide technical assistance to ODJFS and the contracting Medicaid MCPs.	3.1 D.	2					
			2					
ADMIN. STRUCTURES—PROPOSED WORK PLAN								
44	The vendor has included a proposed timeline for the project.	3.3, A.	4					
45	The vendor has provided a technical approach and work plan to be implemented for Activity A and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	11					
46	The vendor has provided a technical approach and work plan to be implemented for Activity B and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
47	The vendor has provided a technical approach and work plan to be implemented for Activity C and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
48	The vendor has provided a technical approach and work plan to be implemented for Activity D and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
49	The vendor has provided a technical approach and work plan to be implemented for Activity E and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
50	The vendor has provided a technical approach and work plan to be implemented for Activity F and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	11					
51	The vendor has provided a technical approach and work plan to be implemented for Activity G and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	11					
52	The vendor has provided a technical approach and work plan to be implemented for Activity H and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
53	The vendor has provided a technical approach and work plan to be implemented for Activity I and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	11					
54	The vendor has provided a technical approach and work plan to be implemented for Activity J and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
55	The vendor has provided a technical approach and work plan to be implemented for Activity K and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	11					
56	The vendor has provided a technical approach and work plan to be implemented for Activity L and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
57	The vendor has provided a technical approach and work plan to be implemented for Activity M and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
58	The vendor has provided a technical approach and work plan to be implemented for Activity N and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
59	The vendor has provided a technical approach and work plan to be implemented for Activity O and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
60	The vendor has provided a technical approach and work plan to be implemented for Activity P and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
61	The vendor has provided a technical approach and work plan to be implemented for Activity Q and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
62	The vendor has provided a technical approach and work plan to be implemented for Activity R and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	11					
63	The vendor has provided a technical approach and work plan to be implemented for Activity S and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
64	The vendor has provided a technical approach and work plan to be implemented for Activity T and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	3					
65	The vendor has provided a technical approach and work plan to be implemented for Activity U and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	11					
66	The vendor has provided a technical approach and work plan to be implemented for Activity V and its respective deliverable(s) as specified in Section 3.4, Specifications of Deliverables of the RFP.	3.3, A.	4					

ITEM #	EVALUATION CRITERIA	RFP SEC. REF.	Weight	Doesn't Meet	Partially Meets	Meets	Exceeds	Ext.
				0	6	8	10	
67	The vendor has provided a status reporting procedure for reporting work completed, and resolution of unanticipated problems.	3.3, B.	4					
68	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 each activity in Section 3.4.	3.3, C.	4					
69	The vendor has: provided a timeline for each component of the scope of work and the project overall including the staff hours for personnel involved; included a Table of Organization (including any subcontractors); a chart showing the number of hours devoted to the project by vendor or subcontractor staff; and, the percentage of time each key management person will devote to the project.	3.3, D.	4					
EQR REPORT SPECIFICATIONS								
70	The vendor has included a statement that if awarded a contract as a result of this RFP process that they will comply with the following EQR report specifications as required by ODJFS.		1					
PROPOSAL ORGANIZATION								
71	The vendor has submitted a proposal which complies with the specified proposal organization.		.5					
72	The vendor has submitted a proposal which has been thoroughly proofread for spelling and grammatical errors.		.25					
73	The vendor has submitted a proposal which is free of self-promotional claims.		.25					
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 2,130 points.)

Yes _____

No _____

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

If yes, has the vendor provided evidence of having an Ohio presence? If there is no demonstrated Ohio presence, the vendor's proposal advances to Phase III review but the final technical score remains unchanged. If there is a demonstrated Ohio presence, the vendor's technical score is increased by **50 points** for the Phase III review.

PHASE II B.— Additional Consideration for an Ohio Presence	4.24 & 6.1, B.	NO – Phase II A technical score unchanged	YES - Phase II A technical score plus 50 pts.
Has the vendor provided evidence of having an Ohio presence?			
GRAND TOTAL SCORE [Phase II A. + Phase II B. score]: [Maximum of 2,788 pts.]			