

ATTACHMENT E
RFP#: R-89-07-0981
Technical Proposal Score Sheet

PHASE I: Initial Qualifying Criteria

The proposal must meet all of the following 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 to the RFP?	VIII(A)		
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.	VIII(A)		
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	Vendor’s proposal includes proof that the vendor is in compliance with IRS, state and local regulations and currently has no outstanding audit findings by these regulatory authorities as it relates to the FMS process.	2.1(a)		
7	Vendor’s proposal provides proof that vendor has been an F/EA in accordance with section 3504 of the IRS Code and IRS Revenue Procedure 70-6 for, at minimum, three years.	2.1(b)		
8	Vendor’s proposal includes letter of commitment from a bonding company for a performance bond that must be equal to at least 5% of the total annual amount of the Contract and remain in place for the term of the Contract.	2.1(c)		
9	Vendor’s proposal includes most current or previous year’s financial audit with the most recent “no material weakness” letter.	2.1(d)		

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 Does Not Meet 6 Partially Meets Requirement 8 Meets Requirement 10 Exceeds Requirement

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 **580** point out of a maximum of **766** 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.	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 RFP.	VIII(A)	2				
VENDOR QUALIFICATIONS							
ORGANIZATIONAL EXPERIENCE & CAPABILITIES							
2	The vendor has documentation of all experience providing fiscal management services as an F/EA in accordance with section 3504 of the IRS code and IRS Revenue Procedure 70-6.	2.2(a)	5				
3	The vendor has documentation, if applicable, of experience providing fiscal management services for older adults, people with MRDD, adults with disabilities, and people with mental health needs.	2.2(b)	5				
4	The vendor has documentation of any experience providing fiscal management services for the Medicaid program.	2.2(c)	5				
5	The vendor has included names and contact information for at least three entities for which they have performed similar large scale projects in the past five (5) years that have at least 3500 participants. Large scale projects would include projects that involve multiple agencies, programs, and funding streams.	2.2(d)	5				
STAFF EXPERIENCE & CAPABILITIES							
6	The vendor has identified, by position and by name, those staff that are key to the project's success. The vendor has described the certification, special training, and education of those key staff.	2.3(a)	3				
7	The vendor has identified, by name, the project manager that will be assigned to this project. The vendor has also included proof of the project manager's bachelor's degree in public health, economics, sociology, business administration, accounting, or other related discipline, and proof of at least four (4) years experience performing project management of a similar service. The vendor must include proof of any Medicaid information system experience, if applicable.	2.3(b)	3				
8	The vendor has identified, by name(s), at least one staff member with a bachelor's degree in accounting and proof of eight (8) years of applicable experience or a master's degree in accounting and two (2) years of applicable experience. The vendor must include proof of any Medicaid information system experience, if applicable.	2.3(c)	3				
9	The vendor has identified by name(s), at least one system analyst assigned to this project. The vendor must provide proof that the system analyst has completed an undergraduate program in information technology or a related field with a minimum of four (4) years experience with various database management systems, programming languages and auditing system edits and data integration procedures. The vendor must include proof of any Medicaid information system experience, if applicable.	2.3(d)	3				
SCOPE OF WORK							
10	The vendor has provided a plan as to how they meet the general work requirements.	3.1 (1) (a-1)	2				
11	The vendor has provided a plan as to how they will manage individuals' budgets.	3.1 (2) (a-f)	3				
12	The vendor has provided a plan that describes their customer service system.	3.1 (3) (a-h)	3				
13	The vendor has provided a plan on how they will manage and maintain records and process reports.	3.1 (4) a-b	3				

14	The vendor has provided a plan on how they will manage invoices for goods and services rendered and how these activities will be reconciled per individual account.	3.1 (5) a-b	3				
15	The vendor has provided a plan on how they will make payment to providers for invoices for supplemental and demonstration services included on individual service plans.	3.1 (6) a-d	3				
16	The vendor has provided a plan on how they will make payment to Ohio Olmstead Taskforce on behalf of HOME Choice Consumer Council members.	3.1 (7)	2				
17	The vendor has provided a plan on how they will manage the program participant workers.	Phase II 3.1 (1) a-f	3				
18	The vendor has provided a plan as to how they will process payroll.	Phase II 3.1 (2) a-k	3				
ADMIN. STRUCTURES—PROPOSED WORK PLAN							
19	The vendor has stated the key objectives of the proposed project. [NOTE: Vendors are advised to refrain from simply restating the objectives as identified in Section 1.5 of this RFP.]	3.3	2				
20	The vendor has provided a technical approach and work plan according to the work listed in all Phases (I, II, III). [NOTE: Vendors are advised to refrain from simply restating the objectives as identified in Section 1.5 of this RFP.]	3.3	3				
21	The vendor has provided a current organizational chart (including any subcontractors) and specified the key management and administrative personnel who will be assigned to this project.	3.3	2				
22	The vendor has provided a timeline for each component of the scope of work outlined in Section 3.1 of this RFP and the project overall.	3.3	4				
SUBCONTRACTING							
23	The vendor has provided a list of any subcontractors and the tasks they will be performing related to this proposal. All information requested is included in proposal. No subcontractors will warrant full points.	4.9	4				
SPECIFICATIONS OF DELIVERABLES							
24	The vendor has provided a plan as to how they will meet all deliverables for all projects across three state agencies.	3.4	3				
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 580 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 ten (10) 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 10 pts.
Has the vendor provided evidence of having an Ohio presence?			
GRAND TOTAL SCORE [Phase II A. + Phase II B. score]:			