

ATTACHMENT E.
RLB#: R-89-14-0579
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.**

ITEM	PROPOSAL ACCEPTANCE CRITERIA	RLB Section Reference	YES	NO
1	Was the vendor’s proposal received by the deadline as specified in the RFP?	1.6, 5.1 & Tab 1		
2	Does the vendor’s proposal include all required affirmative statements and certifications, signed by the vendor/vendor’s responsible representative, as described in Attachment A and C to the RFP?	5.2, b., & Tab 1		
3	Included in those certifications, does the vendor state that he or she 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?	4.18, 5.2, b., & Tab 1		
4	Does the review by ODJFS of the Auditor of State website verify that the vendor is not excluded from contracting with ODJFS by R.C. § 9.24 for an unresolved finding for recovery?	4.18, 5.2, b., & Tab 1		
5	Does the proposal include proper documentation showing that the vendor has experience with other State Unemployment Insurance Agencies in their State Unemployment Trust Funds and benefit payout strategies?	II, 2.1, A.		

PHASE II: Criteria for Scoring of Technical Quality

Technical proposals for each qualifying vendor (*i.e.*, those passing all Phase I criteria) will be collectively scored by a Proposal Review Team (PRT) appointed by ODJFS. Each vendor will be scored according to the criteria provided below. For each of the evaluation criteria on the score sheet, reviewers will collectively judge whether the vendor, according to the submitted proposal, exceed, meet, only partially meet, or fail to meet the requirements and expectations 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 Requirement/Expectation = 6 points
- Meets Requirement/Expectation = 8 points
- Exceeds Requirement/Expectation = 10 points

Each qualifying vendor will be scored collectively by the review team, with all scores decided on through team consensus. Each vendor’s total technical quality score will be the sum of the point value for all PHASE II evaluation criteria. Vendors who do not earn a total score of at least **136 points** (a score which represents that the vendor generally “meets” all the evaluation criteria) out of a maximum of **170 points**, will be disqualified from further consideration. Only those vendors earning scores at or above the minimum required technical points may advance to PHASE III of the scoring and vendor selection process.

ITEM #	PHASE II EVALUATION CRITERIA for TECHNICAL QUALITY	RLB SEC. REF.	Doesn’t Meet 0	Partially Meets 6	Meets 8	Exceeds 10
MANDATORY QUALIFICATIONS						
1	The vendor’s listed experience with other UI agencies in their State Unemployment Trust Funds and benefit payout strategies meets ODJFS expectations regarding the vendor’s general qualifications for the successful performance of the work described in this RFP.	II., 2.1 and Tab 2	If score = 0, vendor is disqualified			

ITEM #	PHASE II EVALUATION CRITERIA for TECHNICAL QUALITY	RLB SEC. REF.	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
2	The vendor provided ample & appropriate documentation (including final reports & narrative descriptions, with discussions of data collection & analysis performed) from two to four similar projects completed in the past ten years.	II., 2.1, A. and Tab 2	If score = 0, vendor is disqualified			
3	According to that documentation, the vendor has expertise in Unemployment Trust Fund Solvency & Unemployment Benefit Enhancement Strategies necessary for the successful performance of the work described in this RFP.	II., 2.1, A. and Tab 2	If score = 0, vendor is disqualified			
4	The proposal included names and contact information for at least two entities for which the vendor successfully completed those projects.	II, 2.1, A. and Tab 2				
STAFF EXPERIENCE & CAPABILITIES						
5	The proposal identifies, by position and name, an individual who participated in at least one of the vendor's work projects described in Section 2.1 above, to be assigned as lead for this project.	II, 2.2, and Tab 2	IF score = 0, vendor proposal may be disqualified at this point			
6	The qualifications of the proposed lead, as indicated by a resume/CV and the description of this person's role in one (or more) of the vendor's projects, meet ODJFS expectations regarding qualifications necessary for the successful performance of the ODJFS work project.	II, 2.2, and Tab 2				
SPECIFICATIONS OF DELIVERABLES						
(Items 7 thru 13)	Proposals are to include a narrative description of the vendor's proposed plan or approach to the performance of each of the deliverables specified in the RFP. To what extent does the vendor's proposed approach for each of the following deliverables meet ODJFS needs and expectations for the successful performance of the work described in the RFP?					
7	For making an evaluation and report of findings on the adequacy of Ohio's State Unemployment Trust Fund and solvency standard under Ohio's current law, using economic forecasts from at least two sources, one of which is the Ohio Office of Budget and Management?	III, 3.3, A. and Tab 3				
8	For producing a report of findings and recommendations for alternative solvency strategies based on best practices from around the nation?	III, 3.3, B. and Tab 3				
9	For producing a report of recommendations for revenue targets necessary to allow the balance of the State Unemployment Trust Fund to recover at various time periods (e.g., 3 to 5 years after recession) based on payout behaviors from economic forecasts used in item 7. above (Deliverable A.). This could include revenue increase and decrease steps based on the fund balance at times of the year.	III, 3.3, C. and Tab 3				
10	For providing research, evaluation and a report on best practices on benefit payout strategies from national, state, and agency resources, including recommendations for adjustments to Ohio law to increase the reciprocity rate. This plan should include how the vendor might estimate statewide implementation costs and produce impact statements on Trust Fund Solvency both under current law and the recommended strategies in item 8. above (Deliverable B.)	III, 3.3, D. and Tab 3				
11	For producing a report of recommendations of options to be incorporated into state law based on the need to recover in the time periods discussed in Item 9. above (Deliverable C.).	III, 3.3, E. and Tab 3				

ITEM #	PHASE II EVALUATION CRITERIA for TECHNICAL QUALITY	RLB SEC. REF.	Doesn't Meet 0	Partially Meets 6	Meets 8	Exceeds 10
12	For supporting a stakeholder work group developing final legislation to address long term solvency of the state Unemployment Trust Fund. Supportive activities may include, for example, providing the work group with research, data reports, and other relevant information.	III, 3.3, F. and Tab 3				
13	For performing and producing a report on a study of the effectiveness and results of the product two years after implementation. Results of this comparison will shape recommendations for further adjustments to solvency strategy and state law in the future.	III, 3.3, G. and Tab 3				
ADMIN STRUCTURES & PROPOSED WORK PLAN						
14	The proposal provides a technical approach and work plan, including a proposed timeline for completion, which if implemented would meet the needs of this project.	III, 3.2 A. and Tab 4				
15	The proposal provides an adequate status reporting procedure for reporting work completed, and for resolving unanticipated problems.	III, 3.2 B. and Tab 4				
16	The proposal provides a current organizational chart (including any subcontractors) and specifies any key management/administrative personnel who will be assigned to this project.	III, 3.2 C. and Tab 4				
17	The proposal provides a reasonable timeline for each component of the scope of work and the project overall including the staff hours for personnel involved, including 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.	III, 3.2 D. and Tab 4				
Column Subtotal of "Partially Meets" points						
Column Subtotal of "Meets" points						
Column Subtotal of "Exceeds" points						
PHASE II TOTAL TECHNICAL QUALITY SCORE: (The sum of all point values earned on each criterion is the Phase II total technical quality score.)						
Based upon the Phase II Total Technical Score earned, does the vendor's proposal proceed to the Phase III? - (To be considered for further review or contract award, Vendor's Phase II Total Technical Score must be at least 136 points out of the 170 possible maximum technical quality score.)			Yes _____ No _____ (If "No," this vendor is disqualified from any further consideration for this project.)			
PHASE III COST PROPOSAL POINTS EARNED (per the Phase III Review process, below)						
OVERALL PROPOSAL GRAND SCORE (Phase II score plus Phase III points)						

Phase III Review: The cost proposals for only those vendors that pass Phase II and advance to Phase III will then be opened. Each such vendor's total proposed project cost (*i.e.*, the sum total cost of all deliverables) will be ranked based on the lowest of the total project costs offered, and based on that ranking, each vendor will be awarded up to a maximum of 90 Cost Proposal Points, according to this schedule:

- The vendor offering the lowest cost will be awarded **90 Cost Proposal Points**, which is 100% of the possible Cost Proposal Points.
- Any vendor offering a cost not more than 10% above the lowest offered price will be awarded **81 points** (90% of the possible Cost Proposal Points).

- Any vendor offering a cost higher than 10% but not more than 20% above the lowest price will be awarded **72 points** (80% of the possible Cost Proposal Points).
- Any vendor offering a cost higher than 20% but not more than 30% above the lowest price will be awarded **63 points** (70% of the possible Cost Proposal Points).
- Any vendor offering a cost higher than 30% but not more than 40% above the lowest price will be awarded **54 points** (60% of the possible Cost Proposal Points).
- Any vendor offering a project cost in excess of 40% over the lowest offered price will be awarded **no points** in Phase III.

If two or more vendors are tied in offering the lowest total project cost, those vendors will each earn 90 points in Phase III. Multiple vendors offering total project costs within the same percentage range over the lowest proposed cost will each be awarded the same percentage of the total possible cost points (*e.g.*, if one vendor offers a cost which is 8% over the lowest offered and another offers a cost 10% over, each of those vendors will be awarded 81 points in Phase III).

VENDOR SELECTION:

Following the Phase III Review, each vendor's Phase III Cost Proposal Points will be added to its Phase II Technical Quality Score to determine the overall proposal score for that vendor. The vendor with the highest overall proposal score will be recommended for award of the contract. (In the event of a tie, the vendor with the higher Phase II Technical Quality Score will be recommended.)