



Department of
Job and Family Services

John R. Kasich, Governor
Michael B. Colbert, Director

May 29, 2013

Dear Vendor:

This letter is to announce the release of the Ohio Department of Job and Family Services' (ODJFS) Request for Letterhead Bids (RLB), document number JFSR1415178048, for Program Management Services, for the purpose of identifying at least one vendor with an approved Department of Administrative Services (DAS) State Term Schedule (STS) to provide the services of staff persons experienced in human services program design and process operations for assistance with system project related supports. Any vendor selected through this RLB process will be responsible for providing dedicated staff who will assist ODJFS employees in the Office of Family Assistance (OFA) with such tasks as managing program oversight, producing business requirements, facilitating meetings and decision-making discussions, coordinating communications, and identifying and communicating program risk through documentation and presentations. This RLB is released by ODJFS. Only vendors with a current, valid STS that includes project consultation activities and the staff capabilities as described in this RLB will be considered.

If you are interested in submitting a bid for this important project, please obtain the RFP through the ODJFS web site at <http://www.ifs.ohio.gov/rfp/>. If you experience problems opening the above referenced ODJFS URL, please contact the RFP/RLB Unit at the following telephone number:

ODJFS, Office of Legal and Acquisition Services
30 East Broad Street, 31st Floor, Suite 3150
Columbus, Ohio 43215
PH: (614) 728-5693

Responses must be prepared and submitted in strict accordance with the requirements and time frames given in the RFP. Thank you for your attention to this request.

Sincerely,

(Signature on file)

Jay Easterling
Deputy Director
Contracts and Acquisitions

30 East Broad Street
Columbus, Ohio 43215
jfs.ohio.gov



Department of Job and Family Services

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Ohio Department of Job and Family Services Request for Letterhead Bids (RLB) RLB#: JFSR1415178048

I. Purpose

The Ohio Department of Job and Family Services (ODJFS) is soliciting bids to identify at least one vendor with an approved Department of Administrative Services (DAS) State Term Schedule (STS) to provide the services of staff persons experienced in human services program design and process operations for assistance with system project related supports. Any vendor selected through this RLB process will be responsible for providing dedicated staff who will assist ODJFS employees in the Office of Family Assistance (OFA) with such tasks as managing program oversight, producing business requirements, facilitating meetings and decision-making discussions, coordinating communications, and identifying and communicating program risk through documentation and presentations. Only vendors with a current, valid STS that includes project consultation activities and the staff capabilities as described in this RLB will be considered.

OFA continually has program policy changes that the state must be in compliance with. As policies change, program and system enhancements are necessary to be completed in order to comply with new program policies. The following list includes both projects that OFA currently has underway and others that are proposed and that may be initiated in the near future:

- Transition and conversion to new Electronic Benefit Transfer (EBT)/Electronic Payment Card (EPC) vendor J.P. Morgan for the delivery of cash and food benefits by June 2013 with accompanying new data warehouse functionality.
- System changes to add an indicator to Client Registry Information System – Enhanced (CRIS-E) for each Food Assistance group member to determine if the assistance group qualifies to use the EBT card for hot meals at specified approved restaurants. This indicator will also provide for enhanced reporting.
- System changes to support the return of unpinned cash benefit funds that currently reside on the exiting vendor electronic benefit card. The process will automate the return by updating the CRIS-E system to indicate the return of benefits to the state and correct the recipient/assistance group Ohio Works First (OWF) time limit count.
- System changes to work participation processes within CRIS-E to support Ohio's Corrective Compliance Plan.
- System changes to support Food Assistance eligibility as mandated yearly by the United States

Department of Agriculture Food and Nutrition Service (FNS), known as a mass change.

- System changes to support the expiration of the American Reinvestment and Recovery Act which will require a system mass change run to correct the benefit allotment for assistance groups receiving Food Assistance benefits due to the expiration of this Act.
- System changes to current logic on the use of failure codes for mixed Food Assistance groups.
- Updates to the system to allow 20 day staggered issuance for specified Food Assistance groups by March 2014.
- Updates to the Self Service account creation process in order to make the process more user friendly, revising the current change request key process.
- Updates to the system to support the prevention of Temporary Assistance to Needy Families (TANF) funds in EBT transactions in specified locations, as required by the Middle Class Tax Relief and Job Creation Act of 2012.
- Updates to the CRIS-E Reports to calculate the correct amount of education related hours an assistance group is using.
- Updates to the TANF Data Report to ensure two parent households' data are pulled correctly to avoid financial penalties.
- Updates to the system so individuals in Fair Hearing Status are included in the work activity reporting.
- Complete review and retest of the Disaster Assistance system to ensure accurate processing and benefit issuance.
- Participation in meetings, research, planning and implementation sessions for the new Integrated Eligibility System (IE) for phases 1.0, 1.5 and 2.0.

These projects are currently managed by a collaborative Project Management Team (PMT) consisting of project managers and staff from OFA. Further system enhancements will be identified, defined, designed, tested and deployed. In order to create these system enhancements, manage these projects, identify associated risks, facilitate coordination of state, county, and vendor activities, and to ensure a timely and complete implementation, additional program area support is necessary as outlined above. This contract will be managed by OFA, who will manage the resources and deliverables. The contractor's assigned staff will function as members of the PMT and will work under the general direction of the OFA Deputy Director.

The normal work schedule for the State of Ohio is Monday through Friday 8:00 am to 5:00 pm. Any contractor staff assigned under this RLB may be released by ODJFS thirty (30) working days after the vendor is notified in writing that the services of that individual will no longer be required.

ODJFS may renew the agreement with the vendor selected through this RLB for one (1) biennia, subject to, and contingent upon, the discretionary decision of the Ohio General Assembly to appropriate funds for this contracted services in each State Fiscal Year. Any such renewal of all or part of the purchase of services is further subject to the satisfactory performance of the selected contractor, the on-going needs of ODJFS, and is at its discretion. The maximum renewal period of the agreement would be through **June 30, 2015**.

ODJFS is under no obligation to enter into an agreement with any vendor as a result of this solicitation, if, in the opinion of ODJFS, none of the proposals are responsive to the objectives and needs of the Department. ODJFS reserves the right to not select any vendor should ODJFS decide not to proceed. Changes in this RLB of a material nature will be provided on the agency website. All vendors are responsible for obtaining any such changes without further notice by ODJFS.

II. Time and Date of Submission

Organizations, companies, firms, or individuals who are interested in submitting letterhead bids must make their submission not later than **3:00 p.m. Eastern (local) Time on *Wednesday, June, 12, 2013***. Faxes will not be accepted. Bids must be addressed to:

**Office of Contracts & Acquisitions
Ohio Department of Job and Family Services
30 East Broad Street, 31st Floor
Columbus, Ohio 43215
ATTN: RFP/RLB Unit**

OCA will accept proposals at any time during normal ODJFS business hours prior to the posted submission deadline (date and time). For hand delivery on the due date, vendors are to allow sufficient time for downtown parking considerations, as well as for security checks at both the lobby of the Rhodes State Office Tower (address as stated above) and again on the 31st Floor. All bids received on the due date will be accepted by the Office of Contracts and Acquisitions on the 31st Floor of the Rhodes Tower. **ODJFS is not responsible for any bids delivered to any address other than the address provided above.**

All submissions must be received, complete, by mail or hand delivery by the above date and time. Materials received after the submission deadline date will not be added to previous submissions, nor be considered. No confirmations of mailed bids received can be provided.

Submission of a proposal indicates acceptance by the vendor of the conditions contained in this RLB, unless clearly and specifically noted in the bid submitted and confirmed in the contract between ODJFS and the vendor selected.

III. Anticipated Procurement and Project Timetable

May 29, 2013	ODJFS Releases RLB to Potential Vendors on the DAS and ODJFS Websites;
3:00 P.M., (local time) June 12, 2013	Vendor proposals must be received by ODJFS, Office of Contracts and Acquisitions by this deadline. - This is the proposal opening date, beginning the ODJFS process of proposal review. LATE PROPOSALS WILL NOT BE CONSIDERED. NO EXCEPTIONS WILL BE MADE.
June 18, 2013	ODJFS Issues Vendor Selection Notification Letter (estimated)

Estimated between June 19 – July 10, 2013, dependent upon state budget approval schedule	Purchase Order approval – work may not begin until a state Purchase Order has been fully approved by OBM. (<u>RANGE OF ESTIMATED APPROVAL DATES</u>)
June 30, 2015	All project work must be completed.

ODJFS reserves the right to revise this schedule in the best interest of the State of Ohio and/or to comply with the State of Ohio procurement procedures and regulations.

* According to requirements of Ohio Revised Code (ORC) 126.07, ODJFS contracts are not valid and enforceable until the Office of Budget and Management (OBM) certifies the availability of appropriate funding, as indicated by the approval of the Purchase Order (P.O.). The selected vendor may neither perform work nor submit an invoice for payment for work performed for this project for any time period prior to the P.O. approval date. The ODJFS Contract Manager will notify the selected vendor when the requirements of ORC Section 126.07 have been met.

IV. Qualifications

In order to be considered for this project, ODJFS requires that interested vendors must address all the following minimum qualifications as well as organizational and/or staff experience and capabilities as described in this Section.

1. **Mandatory Vendor Qualifications** In order to be considered for the project described in this RLB, ODJFS requires that the proposed vendor must meet, at minimum, all the following qualification requirements:

Approved Department of Administrative Services (DAS) State Term Schedules (STS). Vendors are required to submit a copy of their current STS cover page as part of their proposals. Proposals submitted from any other entity or individuals will be rejected.

Vendors failing to meet the above qualification requirements will be disqualified from further consideration for award. Additionally, proposals must be received by ODJFS before the deadline specified in Section III, Anticipated Procurement and Project Timetable in order to be considered. Further mandatory requirements are specified on the Technical Proposal Score Sheet (provided as Attachment C) as Phase I criteria. Failure by a vendor to comply with any of those mandatory requirements will result in that vendor's disqualification.

2. **Staff Experience and Capabilities** Those proposals that at minimum meet all the mandatory requirements identified in Section IV., 1., above, will then be evaluated on the quality and extent of the proposed staff experience and capabilities. Identify, at minimum, the named individual(s) to be assigned for the duration of this project and key to the project's success. These named individuals include Project Manager and a Business Analyst.

a. Program Manager:

- 1) Five (5) years experience with program management on a major system development project that required the compliance with State and Federal programs;
- 2) Minimum of two (2) years experience in analysis, design and implementation of a large-scale roll-out;
- 3) Minimum of two (2) years experience in participating and facilitating Joint Application Design (JAD) and Business Requirements gathering;
- 4) Experience as a program manager on two (2) CRIS-E projects of similar size and scope during the past fifteen (15) years with a minimum of being from initiation to completion. In addition, a minimum of one (1) project must have been within the last five (5) years;
- 5) Experience in two (2) or more large CRIS-E projects using various management tools in defining tasks, identifying program efficiencies and setting timelines for rollout through implementation. Developing project timelines for both program office and business needs; and,
- 6) Experience with change management analysis and implementation for business program processes within two (2) projects, within the last three (3) years.
- 7) Additional Desirable Qualifications:
 - a) Eight (8) years or more experience using CRIS-E for the automated delivery of public assistance service and eligibility.
 - b) Five (5) years or more in public assistance case management, interpreting and implementing federal and state regulations within CRIS-E.

b. Business Analyst(s)

- 1) Three (3) years experience in Case Management activities, including determining program eligibility for customers by using State systems, such as, CRIS-E, Control D, and BIC;
- 2) Three (3) years experience in coordinating and conducting testing phases, i.e. User Acceptance Testing, Parallel Testing, and Operational Testing implemented. This includes experience in testing interfaces between multiple systems and entities;
- 3) Three (3) years experience in researching, identifying, and documenting operational and system deficiencies and recommending new methodologies;
- 4) Three (3) years experience as a business analyst assisting in implementing business changes through the use of technology solutions by ensuring the system changes meet the business needs;

- 5) Three (3) years experience providing program technical assistance to technical leads during multiple phases of a project. This includes identifying project scope, business requirements, and process flows;
- 6) Three (3) years experience creating and monitoring project schedules;
- 7) Two (2) years experience in creating project dashboards;
- 8) Experience with supporting the implementation of at least one system of the same size and scope as defined in this RLB, within the last three (3) years.
- 9) Additional Desirable Qualifications:
 - a) Three (3) years experience in reading and interpreting Federal and State policies and regulations pertaining to eligibility programs (i.e. eligibility, Food Stamps, TANF, and Work Participation);
 - b) Experience in Case Management activities by using State systems, such as, SETS and MMIS.

3. Organizational Experience and Capabilities In order to be considered for the purchase order expected to result from this RLB, ODJFS requires that interested vendors provide the following:

- 1) Background information on the vendor, including subcontractors, if appropriate, indicating sufficient organizational experience and staffing to perform the required work. In the event that the vendor proposes the use of any subcontractors, information on the subcontractor(s) and letters of commitment are required as well.

Sensitive Personal Information: It is the affirmative responsibility of the vendor submitting a proposal to remove all personal confidential information (such as home addresses and social security numbers) of vendor staff and/or of any subcontractor and subcontractor staff from resumes or any other part of the proposal package. Following submission to ODJFS, all proposals submitted become part of the public record. **ODJFS reserves the right to disqualify any vendor whose proposal is found to contain such prohibited personal information.**

V. Scope of Work

The vendor will work with the project management team (PMT) in its efforts to support the Office of Family Assistance in multiple projects, from the business perspective. Potential work assignments for the assigned staff of the selected vendor may include such tasks and services as:

1. Work collaboratively with and in support of the state project managers and PMT to provide general project support within the Office of Family Assistance office.
2. Produce and review (this is not an exclusive list):

- a. Project documentation such as gant charts, schedules, tracking of timelines, Ad Hoc reporting and work tasks.
 - b. Business requirements
 - c. Workflows
 - d. Data Analysis Results
 - e. Communication materials such as newsletters, emails, slide shows, brochures and instructional documents or manuals
 - f. Training materials such as instructional documents or manuals, slide shows, emails, presentations, webinars
 - g. Advance Planning Documents for submission
3. Facilitate and participate in approved project planning, request for change documentation, business requirements, testing and implementation for the projects referred to above in the purpose section. As policy changes continue to occur, additional projects will need to be supported.
 4. Ensure timely identification and documentation of issues and risks following accepted project standards and actively engage in issue resolutions activities, including analysis and tracking of data requests from system users.
 5. Provide project management and business analyst support functions and documentation to the program office with responsibility associated with the Office of Family Assistance projects. This will include planning, documenting, communicating, coordinating, completing and integrating program office project requirements and tasks into the over- arching project plans and schedules.
 6. Responsible for documenting program office project status in a monthly status report in a format to be approved by ODJFS.

VI. Format of Submission

To be accepted and forwarded to the ODJFS Proposal Review Team (PRT), the vendor's proposal must include a signed original and four (4) copies of a technical proposal, and a non-rewritable CD-ROM copy of the entire original technical proposal, according to the format and composition details provided below.

- Technical Proposal. One original and four (4) copies of the Technical Proposal labeled: "**TECHNICAL PROPOSAL ENCLOSED FOR PROGRAM MANAGEMENT SERVICES, RLB#: JFSR1415178048 SUBMITTED BY (VENDOR NAME AND DATE OF SUBMISSION).**"

- One non-rewritable CD-ROM containing a copy of the entire Technical Proposal labeled: **“CD-ROM for PROGRAM MANAGEMENT SERVICES, RLB#: JFSR1415178048 SUBMITTED By (VENDOR NAME AND DATE OF SUBMISSION).”**The requested CD will be used by ODJFS for storage/archiving purposes and for Public Records Requests only.

The vendor’s Technical Proposal shall contain all the information as specified for each component listed below. It is mandatory that vendor proposals be organized in the following order. Any other information thought to be relevant, but not applicable to a specific RLB section number/letter must be provided as an appendix to the proposal and so marked as an additional tab. ODJFS reserves the right not to review submitted appendices which include information or materials that were not required in the RLB. However, the proposal will be scored on the relevancy to the stated responsibilities as well as the conciseness, clarity, flow, and neatness of the information presented. A proposal which is incomplete, vague, unjustifiably wordy, unclear, or poorly organized may not be successful.

A. Technical Proposal Organization

Tab 1: Forms and Certifications

Vendors submitting proposals must include a completed “Required Vendor Information and Certifications,” which also includes one required attestation identified as the “Location of Business Form”, (provided as Attachment A.). The vendor must provide originals of this document, signed in blue ink by an authorized vendor representative, in this part of the technical proposal packet. **Failure to include required certifications and attestations will result in the vendor’s disqualification.**

Tab 2: Vendor Qualifications. The vendor proposal must include all documents and information as outlined in Section IV, Qualifications, demonstrating how the vendor and its staff meet the requirements, specifically:

- Sub-Tab 2a.** Mandatory Vendor Qualification
- Sub-Tab 2b.** Staff Experience and Capabilities
- Sub-Tab 2c.** Organizational Experience & Capabilities

Tab 3: Vendor Attachments or Appendices

Tab 4: Vendor Cost Proposal/Budget

Vendor proposals must be prepared and submitted in accordance with instructions found in this Section.

Proposals MUST be received by ODJFS complete no later than 3:00 p.m., local time on **Wednesday, June 12, 2013**. Submission of a proposal indicates acceptance of the conditions contained in this RLB, unless clearly and specifically noted in the proposal submitted and confirmed in the agreement between ODJFS and the vendor. The proposal must contain the following components (organized in the primary sections and sub-sections) as described below. Any other information thought to be relevant, but not applicable to a specific RLB section number/letter must be provided as an appendix to the proposal and so marked as an additional section. ODJFS reserves the right not to review submitted appendices which include information/materials not required in the RLB. All pages beyond Section 1. shall be sequentially numbered.

VII. Selection Process

All proposals will be reviewed and scored by a Proposal Review Team (PRT) comprised of ODJFS staff. Vendors should not assume that the review team members are familiar with any current or past work activities with ODJFS. Proposals containing assumptions, lack of sufficient detail, poor organization, lack of proofreading, and unnecessary self-promotional claims will be evaluated accordingly. PRT members are required to sign disclosure forms to establish that they have no personal or financial interest in the outcome of the proposal review and contractor selection process. The PRT reserves the right to reject any and all proposals, in whole or in part, received in response to this request. The PRT may waive minor defects that are not material when no prejudice will result to the rights of any vendor or to the public.

In scoring the proposals, ODJFS will score in three phases: Phase I—Initial Qualifying Criteria, Phase II—Scoring of the Technical Proposal, and Phase III—Consideration of Proposed Cost. In addition, the PRT may, at its option, elect to conduct interviews as part of the process, and ODJFS may seek vendors' last and final offers of pricing prior to final selection of a vendor for this project. All score criteria are presented in the Technical Proposal Score Sheet, which is provided as Attachment B. to this RLB.

A. Phase I. Review—Initial Qualifying Criteria:

In order to be fully reviewed and scored, proposals submitted must pass Phase I. Review as required in the Technical Proposal Score Sheet. **Any “no” for the listed Phase I. criteria will eliminate a proposal from further consideration. Please refer to Attachment B, Technical Proposal Score Sheet for a complete listing of initial disqualifiers.**

B. Phase II. Review—Criteria for Scoring the Technical Proposal:

The PRT will then score those qualifying technical proposals, not eliminated in Phase I. Review, by assessing how well the vendor meets the requirements as specified in the RLB. Using the score sheet for Phase II scoring (see **Attachment B.** of this RLB for specific evaluation criteria), the PRT will read, review, discuss and reach consensus on the final technical score for each qualifying technical proposal.

Any proposal which does not meet the minimum required technical proposal score as defined in Attachment B will be disqualified from any further consideration. *Vendors who demonstrate that they are a certified MBE/EDGE vendor will receive additional consideration as specified in the Technical Proposal Score Sheet.* **Please refer to Attachment B, Technical Proposal Score Sheet for maximum and minimum allowable scoring thresholds and definitions of scoring values.**

IMPORTANT: Before submitting a proposal to ODJFS in response to this RLB, vendors are strongly encouraged to use the Technical Proposal Score Sheet (**Attachment B.**) to review their proposals for completeness, compliance and quality.

C. Phase III.—Criteria for Considering the Cost Proposal

Each vendor that earns at least the minimum acceptable Technical Proposal Score in Phase II will be scored in Phase III. The 1220 maximum point on Attachment B Technical Proposal

Score sheet represents 80% of the 1,525 total points possible. Of the 1,525 total points, 1220 are maximum technical proposal points and 305 are the maximum points available for the lowest proposed cost. Vendors' proposed hourly rates must be at or below their established STS rates for those services.

Prices will be scored by rank-ordering vendors according to the proposed hourly prices submitted in vendor proposals for each position proposed. The maximum cost points will be awarded to the vendor proposing the lowest price (per position), with the higher prices earning points decreased in 10% increments. The lowest hourly price offered will be awarded 100% of the 305 possible cost points; the next lowest price will be awarded 90% of 305 points; the third lowest price, 80% of 305 points, etc. Fractions of points of one-half or more will be rounded up to the next whole number, and below one-half will be rounded down.

If exactly the same prices are offered by two or more vendors, those vendors will earn the same number of cost points, as appropriate for where that cost is ranked among all qualifying vendors' proposed costs (the lowest, fourth-lowest, etc.).

Following the ranking of qualifying vendors' proposed costs and the assignment of cost points according to the process described above, each vendor's cost points are added to its technical quality points to establish that vendor's total score. The vendor or vendors earning the highest total score will be recommended for this project. If there is a tie between two or more vendors at the conclusion of this process, the vendor that had earned the higher technical score among those tied will be recommended for selection.

ODJFS may, at its sole discretion, negotiate with all technically qualifying vendors for revised costs. Vendors may then submit one last and best offer, or may request that ODJFS view its original cost proposal as its last and best offer, or may formally withdraw from further consideration, and shall formally indicate its choice according to directions provided by ODJFS at that time. Upon receipt of all last and best offers, ODJFS will then consider those vendors' revised cost proposals which are within the budget according to the process described in this section above, and in the Technical Proposal Score Sheet, Attachment B., for vendor selection purposes.

DISQUALIFIERS FOR PROPOSAL ERRORS:

- Any vendor's Technical Proposal found to contain any cost information shall be disqualified from consideration. Cost information is defined as any dollar amounts which might be deemed to be indicative of the relative cost or economy of the proposed project. Information on the assets, value, or historical business volume of the vendor is NOT considered to be such prohibited cost information, and MAY be included in any vendor's technical proposal as information on business capacity and stability. All prohibited cost information must be submitted with the separate, sealed Cost Proposal. The Technical Proposal is defined as any part of the vendor's proposal (either as required by ODJFS or sent at vendor's discretion), such as work plan, resumes, letters of recommendation, letters of cooperation from any subcontractors, etc., which is not specifically

identified by ODJFS as a required component of the separate, sealed Cost Proposal. Should a vendor determine to include in the technical proposal any documents which contain such cost information, the cost information in those documents must be made unreadable by the vendor before submission of the proposal to ODJFS. Failure to follow these instructions will result in disqualification.

- Any trade secret, proprietary, or confidential information (as defined in Section VIII., 4. of this RLB) found anywhere in a vendor's proposal shall result in immediate disqualification of that vendor's proposal.
- Any sensitive personal information on vendor or sub-contract staff (*e.g.*, social security numbers, addresses) must be omitted from vendor proposals, or rendered fully unreadable, or ODJFS may at its option disqualify the vendor from any consideration.

VIII. **RLB Process Information and Other Contractual Requirements:**

1. Interview

Vendors submitting proposals may be requested to participate in an in-depth interview as part of the evaluation process. The interview, if necessary, may include participants from ODJFS and any representatives it may appoint. ODJFS reserves the right to select from responding vendors for interviews and may not interview all vendors submitting proposals. The vendor shall bear all costs of any scheduled interview.

2. Start Work Date

The selected vendor must be able to begin work no later than seven (7) working days after the time funds are encumbered and approved by the Office of Budget & Management. The selected vendor will be notified by the OFA contract manager when work may begin. **Any work begun by a contractor prior to this notification will NOT be reimbursable by ODJFS.**

3. Proposal Costs

Costs incurred in the preparation of this proposal are to be borne by the vendor, and ODJFS will not contribute in any way to the costs of the preparation. Any costs associated with interviews will be borne by the vendor and will not be ODJFS' responsibility (see Section VIII, 1.).

4. Trade Secrets Prohibition; Public Information Disclaimer

Vendors are prohibited from including any trade secret information as defined in Ohio Revised Code (ORC) 1333.61 in their proposals in response to any ODJFS Request for Proposal (RFP), Requests for Letterhead Bids (RLB) or other procurement efforts. ODJFS shall consider all proposals or similar responses voluntarily submitted in response to any ODJFS RFP, RFA, RLB, or other procurement document, to be free of trade secrets and such proposals shall, in their entirety, be made a part of the public record.

All proposals and any other documents submitted to ODJFS in response to any RFP, RLB, etc., shall become the property of ODJFS. This RLB and, after the selection of a vendor for award, any proposals submitted in response to an RFP/RLB are deemed to be public records pursuant to R.C. 149.43. For purposes of this section, the term "proposal" shall mean both the technical proposal (or application or other response documentation) and the cost proposal, if opened, submitted by the selected vendor/applicant, and any attachments, addenda, appendices, or sample products.

Any proposals submitted in response to any ODJFS RFP, RLB, etc. which make claims of trade secret information shall be disqualified from consideration immediately upon the discovery of such unallowable claim.

5. Travel and Parking Expense Reimbursement

No travel or parking expenses, nor any other expenses, will be covered.

6. Public Release of Records

Public release of any evaluation or monitoring reports funded under this contract will be made only by ODJFS. Prior to public release of such reports, ODJFS must have at least a 30-day period for review and comment.

7. Confidentiality

All contracts or other business agreements will require that the contractor maintain the confidentiality of information and records which state and federal laws, rules, and regulations require to be kept confidential.

8. Ethical & Conflict of Interest Requirements

- A. No contractor or individual, company or organization seeking a contract or other business agreement shall promise or give to any ODJFS employee anything of value that is of such character as to manifest a substantial and improper influence upon the employee with respect to his or her duties;
- B. No contractor or individual, company or organization seeking a contract or other business agreement shall solicit any ODJFS employee to violate any of the conduct requirements for employees;
- C. Any contractor acting on behalf of ODJFS shall refrain from activities which could result in violations of ethics and/or in conflicts of interest. Any contractor or potential contractor who violates the requirements and prohibitions defined here or of Section 102.04 of the ORC is subject to termination of the contract or other agreement or refusal by ODJFS to enter into a one; and
- D. ODJFS employees and contractors who violate Sections 102.03, 102.04 2921.42 or 2921.43 of the ORC may be prosecuted for criminal violations.

9. Unresolved Findings for Recovery (R.C. 9.24)

Ohio Revised Code Section 9.24 prohibits ODJFS from awarding a contract to any entity against whom the Auditor of State has issued a finding for recovery if the finding for recovery is “unresolved” at the time of award. By submitting a proposal, the vendor warrants that it is not now, and will not become, subject to an “unresolved” finding for recovery under R.C. 9.24 prior to the award of any contract or business agreement arising out of this RLB, without notifying ODJFS of such finding. ODJFS will review the Auditor of State’s website prior to the evaluations of any proposal submitted pursuant to this RLB. ODJFS will not evaluate a proposal from any vendor whose name, or the name of any of the subcontractors proposed by the vendor, appears on the website of the Auditor of the State of Ohio as having an “unresolved” finding for recovery.

10. Mandatory Contract Performance Disclosure

Each proposal must disclose whether the vendor’s performance, or the performance of any of the proposed subcontractor(s), under contracts for the provision of services that are the same or similar to those described in this RLB, has resulted in any “formal claims” for breach of those contracts. For purposes of this disclosure, “formal claims” means any claims for breach that have been filed as a lawsuit in any court, submitted for arbitration (whether voluntary or involuntary, binding or not), or assigned to mediation. If any such claims are disclosed, vendor shall fully explain the details of those claims, including the allegations regarding all alleged breaches, any written or legal action resulting from those allegations, and the results of any litigation, arbitration or mediation regarding those claims, including terms of any settlement. While disclosure of any formal claims in response to this section will not automatically disqualify a vendor from consideration, at the sole discretion of ODJFS, such claims and a review of the background details may result in a rejection of the vendor’s proposal. ODJFS will make this decision based on its determination of the seriousness of the claims, the potential that the behavior that led to the claims could negatively impact vendor’s performance of the work, and the best interests of ODJFS.

11. Mandatory Disclosures of Governmental Investigations

Each proposal must indicate whether the vendor and any of the proposed subcontractor(s) has been the subject of any adverse regulatory or adverse administrative governmental action (federal, state, or local) with respect to vendor’s performance of services similar to those described in this RLB. If any such instances are disclosed, vendor must fully explain, in detail, the nature of the governmental action, the allegations that led to the governmental action, and the results of the governmental action including any legal action that was taken against vendor by the governmental agency. While disclosure of any governmental action in response to this section will not automatically disqualify a vendor from consideration, such governmental action and a review of the background details may result in a rejection of the vendor’s proposal at the sole discretion of ODJFS. The decision by ODJFS on this issue will be based on a determination of the seriousness of the matter, the matter’s potential impact on the vendor’s performance of the work, and the best interests of ODJFS.

12. Vendor Selection Restriction

Any vendor deemed not responsible, or submitting a proposal deemed not to be responsive to the terms of this RLB, shall not be selected for this project.

13. Waiver of Minor Proposal Errors

ODJFS may, at its sole discretion, waive minor errors or omissions in proposals, bids, and/or forms when those errors do not unreasonably obscure the meaning of the content. Additionally, ODJFS reserves the right to request clarifications or completions from vendors to any information in their proposals, bids, and/or forms, and may request such clarification as it deems necessary at any point in the proposal/bid review process.

IX. Health Insurance Portability & Accessibility Act (HIPAA) Requirements

As a condition of receiving a contract from ODJFS, the contractor, and any subcontractor(s), will be required to comply with 42 U.S.C. Sections 1320d through 1320d-8, and the implementing regulations found at 45 C.F.R. Section 164.502 (e) and Sections 164.504 (e) regarding disclosure of protected health information under the Health Insurance Portability and Accountability Act (HIPAA) of 1996. Protected Health Information (PHI) is information received by the contractor from or on behalf of ODJFS that meets the definition of PHI as defined by HIPAA and the regulations promulgated by the United States Department of Health & Human Services, specifically 45 CFR 164.501 and any amendments thereto. The selected vendor can reasonably anticipate HIPAA language in the contract that results from this RFP.

In the event of a material breach of contractor obligations under this section, ODJFS may at its option terminate the contract according to provisions within the contract for termination.

X. Caveat

ODJFS is under no obligation to select any vendor as a result of this solicitation if, in the opinion of ODJFS and the proposal review team, none of the proposals are responsive to the objectives and needs of the Department. ODJFS reserves the right to not select any vendor should ODJFS decide not to proceed with the project.

XI. Communications Prohibitions

From the issuance date of the RLB, until a contract is in effect, there may be no communications concerning the RLB between any interested potential vendor and any employee of ODJFS in the issuing office, or any other ODJFS employee, or any other individual regardless of their employment status, who is in any way involved in the development of the RLB or the decision with a formal procurement.

The only exceptions to this prohibition are as follows:

1. As necessary in the case of any pre-existing business relationship between ODJFS and a vendor which could potentially respond to this RLB, in order to conduct that business;

2. As part of an interview necessary for ODJFS to make a vendor selection decision;
3. If it becomes necessary to revise any part of this RLB, revisions will be posted on the ODJFS web page established for this RLB; and
4. Any Public Records Request (PRR) made through the ODJFS Office of Legal and Acquisition Services:

Requests from potential vendors or contractors for copies of previous RLBs, past vendor proposals, score sheets or contracts for this or similar past projects, are PRRs, and when submitted in accordance with directions provided in this Section XI., Communications Prohibitions, will be honored.

* Important Note: Amendments to the RLB or to any documents related to it will be accessible to interested vendors through the original ODJFS website established for the RLB. All interested vendors are strongly encouraged to refer to the appropriate website regularly for amendments or other announcements. Failure on the part of ODJFS to notify any vendors of any possible changes or announcements related to this RLB does not absolve the vendors from their responsibility to look for updated information through the web page.

Proposals submitted by a vendor who attempts any communications prohibited by this Section may be disqualified by ODJFS from consideration for this project.

XII. Protests

Any potential, or actual, vendor objecting to the award of a contract or a vendor selection resulting from the issuance of this solicitation may file a protest of the award or selection, or of any other matter relating to the process of soliciting the proposals. Such a protest must comply with the following guidelines:

1. A protest may be filed by a prospective or actual bidder objecting to the award of a contract resulting from this solicitation. The protest shall be in writing and shall contain the following information:
 - a. The name, address, and telephone number of the protestor;
 - b. The name and number of the solicitation being protested;
 - c. A detailed statement of the legal and factual grounds for the protest, including copies of any relevant documents;
 - d. A request for a ruling by ODJFS;
 - e. A statement as to the form of relief requested from ODJFS; and
 - f. Any other information the protestor believes to be essential to the determination of the factual and legal questions at issue in the written protest.
2. A timely protest shall be considered by ODJFS, if it is received by ODJFS' Office of Contracts and Acquisitions, within the following periods:

1. A protest based on alleged improprieties in the issuance of the RFP or any other event preceding the closing date for receipt of proposals which are apparent or should be apparent prior to the closing date for receipt of proposals shall be filed no later than 3:00 p.m. the closing date for receipt of proposals, as specified in Section III, Anticipated Procurement Timetable, of this RLB.
2. If the protest relates to the announced intent to award a contract, the protest shall be filed no later than 3:00 p.m. of seventh (7th) calendar day after the issuance of formal letters sent to all responding vendors regarding the State's intent to make the award. The date on these ODJFS letters to responding vendors is the date used to determine if a protest regarding the intent to award is submitted by the end of the protest period.
3. An untimely protest may be considered by ODJFS if ODJFS determines that the protest raises issues significant to the department's procurement system. An untimely protest is one received by ODJFS' Office of Contracts and Acquisitions after the time periods set forth in Item #2 of this section.
4. All protests must be filed at the following location:

Deputy Director
ODJFS Office of Contracts and Acquisitions
30 East Broad Street, 31st Floor
Columbus, Ohio 43215
5. When a timely protest is filed, a contract award shall not proceed until a decision on the protest is issued or the matter is otherwise resolved, unless the Director of ODJFS determines that a delay will severely disadvantage the Department. The vendor(s) who would have been awarded the contract(s) shall be notified of the receipt of the protest, as the protest may result in a change in the agency's announced intent to award the contract(s).
6. The ODJFS Office of Contracts and Acquisitions shall issue written decisions on all timely protests and shall notify any vendor who filed an untimely protest as to whether or not the protest will be considered.

XII. ATTACHMENTS AND APPENDICES

Attachments

- A. Required Vendor Information and Certifications and Location of Business Form** (To be completed & included in proposal packet as specified in Sec. VI., A.)
- B. Technical Proposal Score Sheet** (For vendor self-evaluation purposes...do not submit)

Thank you for your interest in this project.

Attachment A

**Attachment A consists of 2 distinct and different sections.
Both sections must be completed and included in Tab 1
of the proposal.**

Section I – Required Vendor Information

Section II - Location of Business Form

Attachment A—Section I.

REQUIRED VENDOR INFORMATION and CERTIFICATIONS

Purpose: ODJFS requires the following information on vendors who submit proposals or bids in response to any ODJFS Requests for Proposals (RFPs) or Requests for Letterhead Bids (RLBs), in order to facilitate the development of the contract (or finalization of a purchase) with the selected vendor. ODJFS reserves the right to reject your proposal if you fail to provide this information fully, accurately, and by the deadline set by ODJFS. Further, some of this information (as identified below) **must** be provided in order for ODJFS to accept and consider your proposal\bid. **Failure to provide such required information will result in your proposal’s immediate disqualification.**

Instructions: Provide the following information regarding the vendor submitting the proposal or bid. Vendors may either print this attachment, complete and sign it, or may provide the required information and certifications (each fully re-stated from this attachment) on their letterhead as the opening pages of their proposals. It is mandatory that the information provided is certified with an original signature (in blue ink, please) from a person with authority to represent the vendor. Vendors are to provide the completed and signed information and certifications as the cover pages of their original proposal submitted to ODJFS.

IMPORTANT: If the RFP\RLB specified a maximum page limit for vendor proposals\ bids, the attachment of any required certifications, other documents, or additional pages needed to fully provide the information requested here will NOT be counted against that page limit.

Vendors must provide all information

1. ODJFS RFP/RLB #:	2. Proposal Due Date:
3. Vendor Name: (legal name of the vendor – person or organization – to whom contract\purchase payments would be made)	
3a. Vendor’s Ohio Administrative Knowledge System (OAKS) ID#: [Vendors may apply for an OAKS vendor ID# at: http://ohiosharedservices.ohio.gov/Vendors.aspx . The necessary forms to be completed and remitted to Ohio Shared Services are the Vendor Information Form (OBM-5657) and the IRS Form W-9. Completion and/or submission of these forms to Ohio Shared Services <u>does not</u> assume a vendor/applicant award of any ODJFS contract/grant.]	
4. Vendor Corporate Address:	5. Vendor Remittance Address: (or “same” if same as Item # 5)
6. Print or type information on the vendor representative/contact person <u>authorized to answer questions on the proposal\bid</u>: Vendor Representative NAME and TITLE: Address: E-Mail Address: Phone #: _____ Fax #: _____	
7. Print or type the name of the vendor representative <u>authorized to address contractual issues, including the authority to execute a contract on behalf of the vendor, and to whom legal notices regarding contract termination or breach, should be sent</u> (if not the same individual as in #7, provide the following information on each such representative and specify their function): Vendor Representative NAME and TITLE: Address: E-Mail Address: Phone #: _____ Fax #: _____	

8. Is this vendor an Ohio certified MBE? Yes No If yes, attach a copy of current certification to proposal/bid. (If ODJFS has specified the RFP\RLB\purchase document as an opportunity open exclusively to Ohio Certified MBEs, then failure to attach a copy of current certification WILL RESULT IN DISQUALIFICATION.)

9. Mandatory Vendor Certifications:

ODJFS may not enter into contracts with/make purchases from any vendors who have been found to be ineligible for state contracts under specific federal or Ohio statutes or regulations. Vendors responding to any ODJFS RFP\RLB or other purchase opportunity MUST certify that they are NOT INELIGIBLE by signing each of the three statements below. Failure to provide proper affirming signature on any of these statements will result in the disqualification of your proposal/bid.

I _____ (signature of representative shown in Item # 7, above) hereby certify and affirm that _____ (name of the vendor shown in Item # 3, above), has not been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in transactions by the United States Department of Labor, the United States Department of Health and Human Services, or any other federal department or agency as set forth in 29 CFR Part 98, or 45 CFR Part 76, or other applicable statutes.

AND

I _____ (signature of representative shown in Item #7, above) hereby certify and affirm that _____ (name of the vendor shown in Item # 3, above), is not on the list established by the Ohio Secretary of State, pursuant to ORC Section 121.23, which identifies persons and businesses with more than one unfair labor practice contempt of court finding against them.

AND

I _____ (signature of representative shown in Item #7, above) hereby certify and affirm that _____ (name of the vendor shown in Item # 3, above), either is not subject to a finding of recovery under ORC Section 9.24, or has taken appropriate remedial steps required under that statute, or otherwise qualifies under that section to enter into contracts with the State of Ohio.

10. Equal Employment Opportunity Information on the Vendor and any Subcontractor(s)

A. Provide vendor employee data both nationwide (including Ohio staff), and Ohio office employees separately:

	Nationwide:	Ohio Offices:
Total Number of Employees:	_____	_____
% of those who are Women:	_____	_____
% of those who are Minorities:	_____	_____

B. If you are the selected vendor, will you subcontract any part of the work?

NO -or- YES, but for less than 50% of the work -or- YES, for 50% or more of the work

If yes, provide the following information on each subcontractor (additional pages may be added as needed):

Subcontractor Name: _____
Address: _____

Work To Be _____
Performed: _____
(a brief description) _____

Subcontractor's Estimated Percentage of Total Project (in % of work, not % of dollars): _____

If 50% or more of the work will be subcontracted, then ALSO provide the following information on ALL proposed subcontractors:

	Nationwide:	Ohio Offices:
Total Number of Employees:	_____	_____
% of those who are Women:	_____	_____
% of those who are Minorities:	_____	_____

C. Identify all state contracts which the vendor has had approved by the Controlling Board since the beginning of the last fiscal year (i.e., since July 01, 2011) through this fiscal year to date. Also include contracts approved for ODJFS or institutions of higher education:

Total number of contracts: _____

For each state contract, list the state agency and provide the following information:

State Agency/Educational Institution: _____

Contract Dollar Amount: _____

State Agency/Educational Institution: _____

Contract Dollar Amount: _____

State Agency/Educational Institution: _____

Contract Dollar Amount: _____

Attach additional pages if needed

11. Vendor and Grantee Ethics Certification

As a vendor or grantee doing business with* or receiving grants from the State of Ohio, I certify on behalf of _____ (name of vendor or grantee):

(1) I have reviewed and understand Ohio ethics and conflict of interests laws, as found in Chapter 102. and Sections 2921.42 and 2921.43 of the Ohio Revised Code.

(2) I acknowledge that failure to comply with this certification, is, by itself, grounds for termination of this contract or grant with the State of Ohio.

Signature of authorized agent

Date

*"Doing business with" includes all contracts for goods and services, excluding purchases made using the State of Ohio's Payment Card Program that cost less than \$1,000.

12. I have read the ODJFS Model Contract attached to the RFP/RLB, and if awarded a contract, I will not ____ (or) I will ____ request changes to the standard language, and have marked the requested changes and returned the model document with this proposal for consideration by ODJFS. (If so, ODJFS will review those requested changes if you are the selected vendor. All requested changes to model contract language are subject to ODJFS approval.) (**NOTE:** Item 13 is not applicable and not required when the subject ODJFS procurement opportunity is offered only to State Term Schedule Vendors.)

13. I _____, (vendor representative in Item # 7) hereby affirm that this proposal accurately represents the capabilities and qualifications of _____ (vendor's name), and I hereby affirm that the cost(s) bid to ODJFS for the performance of services and/or provision of goods covered in this proposal in response to the ODJFS RFP/RLB/other purchase opportunity is a firm fixed price, inclusive of all incidental as well as primary costs. (Failure to provide the proper affirming signature on this item may result in the disqualification of your proposal\bid.)

14. Location of Business Declaration: Vendors responding to any ODJFS RFP/RLB/RFGA (etc.) must certify that no public funds shall be spent on services provided/performed offshore by completing, signing, and returning the "Location of Business Form," which is the final section of this attachment. **FAILURE TO PROPERLY COMPLETE, SIGN AND RETURN THIS FORM, INCLUDING THE "LOCATION OF BUSINESS FORM," WILL RESULT IN DISQUALIFICATION OF THE VENDOR FROM CONSIDERATION FOR AWARD OF AN ODJFS CONTRACT.**

15. I _____, (vendor representative in Item # 7) hereby attest that I understand that any and all information included in this proposal is not confidential and/or trade secret information (as defined in Sections 3.3, 5.2, D., 8.5, and 8.25 of the RFP or where found in an RLB document) and that the proposal submission may be posted in its entirety on the Internet for public viewing. Following submission to ODJFS, all proposals submitted may become part of the public record. ODJFS reserves the right to disqualify any vendor whose proposal is found to contain such prohibited personal information. **The vendor affirms that they shall be solely responsible for any and all information disclosed in the proposal submission and any or all information released by ODJFS in a public records request(s).**

Attachment A—Section II.

Location of Business Form

Pursuant to Governor’s Executive Order 2011-12K (www.governor.ohio.gov), no public funds shall be spent on services provided offshore. This form serves as a certification of compliance with this policy and required disclosures. Please answer the following questions about the project or service you are seeking to perform for or the funding for which you are applying from the Ohio Department of Job and Family Services:

1. Principal location of business of Contractor:

(Address)

(City, State, Zip)

Name/Principal location of business of subcontractor(s):

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

2. Location where services will be performed by Contractor:

(Address)

(City, State, Zip)

Name/Location where services will be performed by subcontractor(s):

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

3. Location where state data will be stored, accessed, tested, maintained or backed-up, by Contractor:

(Address)

(Address, City, State, Zip)

Name/Location(s) where state data will be stored, accessed, tested, maintained or backed-up by subcontractor(s):

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

4. Location where services to be performed will be changed or shifted by Contractor:

(Address)

(Address, City, State, Zip)

Name/Location(s) where services will be changed or shifted to be performed by subcontractor(s):

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

By signing below, I hereby certify and affirm that I have reviewed, understand, and will abide by the Governor's Executive Order 2011-12K. I attest that no funds provided by ODJFS for this project or any other agreement will be used to purchase services provided outside the United States or to contract with a subcontractor who will use the funds to purchase services provided outside the United States. I will promptly notify ODJFS if there is a change in the location where any of the services relating to this project will be performed. If I am signing this on behalf of a company, business, or organization, I hereby acknowledge that I have the authority to make this certification on behalf of that entity.

Signature

Date

Entity Name

Address (Principal place of business)

Printed name of individual authorized
to sign on behalf of entity

City, State, Zip

ATTACHMENT B

RLB JFSR1415178048

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 Sec. Reference	YES	NO
1	Was the vendor’s proposal received by the deadline as specified in the RLB?	III.		
2	Does the vendor’s proposal include all required affirmative statements and certifications, signed (in all required parts) by the vendor’s responsible representative, as described in Attachment A to the RLB?	VI. A.		
3	Is the vendor free from being prohibited to enter into a contract with ODJFS, due to restrictions related to the federal debarment list, unfair labor findings, or as established in ORC 9.24?	Attach A.		
4	Is the vendor Approved Department of Administrative Services (DAS) State Term Schedules (STS). Vendors are required to submit a copy of their current STS cover page as part of their proposals.	IV. 1.		
5	Did the review team (in its initial/cursory review of the vendor’s proposal) determine that the proposal was free of trade secret/proprietary information as specified/restricted in the RLB?	VIII, 4.		
6	Did the vendor remove all personal confidential information (such as home addresses and social security numbers) of vendor staff and/or of any subcontractor and subcontractor staff from resumes or any other part of the proposal package? [As stated in the RLB, “ODJFS reserves the right to disqualify any vendor whose proposal is found to contain such prohibited personal information.”]	IV.		
	If response to the above criterion is “no”, has ODJFS exercised its right to allow prohibited personal information in vendors’ proposals for this RLB project? a) If “yes” to this question, the vendor’s proposal shall advance to Phase II scoring contingent upon vendor’s proposal receiving a “yes” response to all other Phase I criteria. b) If “no” to this question, the vendor’s proposal shall be disqualified and not receive further consideration.			

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 Family Assistance. 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 Requirement

Technical Performance Scoring Definitions:

“Does Not Meet Requirement”- A particular RLB requirement was not addressed in the vendor’s proposal, **Score: 0**

“Partially Meets Requirement”-Vendor proposal demonstrates some attempt at meeting a particular RLB requirement, but that attempt falls below acceptable level, **Score: 6**

“Meets Requirement”-Vendor proposal fulfills a particular RLB requirement in all material respects, potentially with only minor, non-substantial deviation, **Score: 8**

“Exceeds Requirement”-Vendor proposal fulfills a particular RLB requirement in all material respects, and offers some additional level of quality in excess of ODJFS expectations, **Score: 10**

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 **927** points (a score which represents that the selected vendor has the capability to successfully perform the project/program services) out

of a maximum of **1220** points, will be disqualified from further consideration. 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
VENDOR QUALIFICATIONS							
STAFF EXPERIENCE & CAPABILITIES							
1	Program Manager has five (5) years experience with program management on a major system development projects that required the compliance with State and Federal programs.	IV. 2. a. 1	10				
2	Program Manager has a minimum of two (2) years experience in analysis, design and implementation of a large-scale roll-out.	IV. 2. a. 2	8				
3	Program Manager has a minimum of two (2) years experience in participating and facilitating Joint Application Design (JAD) and Business Requirements gathering.	IV. 2. a. 3	5				
4	Program Manager has experience as a program manager on two (2) CRIS-E projects of similar size and scope during the past fifteen (15) years with a minimum of being from initiation to completion. In addition, a minimum of one (1) project must have been within the last five (5) years.	IV. 2. a. 4	12				
5	Program Manager has experience in two (2) or more large CRIS-E projects using various management tools in defining tasks, identifying program efficiencies and setting timelines for rollout through implementation. Developing project timelines for both program office and business needs.	IV. 2. a. 5	12				
6	Program Manager has experience with change management analysis and implementation for business program processes within two (2) projects, within the last three (3) years.	IV. 2. a. 6	10				
7	Program Manager has eight (8) years or more experience using CRIS-E for the automated delivery of public assistance service and eligibility.	IV. 2. a. 7, a	2				
8	Program Manager has five (5) years or more in public assistance case management, interpreting and implementing federal and state regulations within CRIS-E.	IV. 2. a. 7, b	2				
9	Business Analyst(s) has three (3) years experience in Case Management activities, including determining program eligibility for customers by using State systems, such as, CRIS-E, Control D, and BIC.	IV. 2. b. 1	10				
10	Business Analyst(s) has three (3) years experience in coordinating and conducting testing phases, i.e. User Acceptance Testing, Parallel Testing, and Operational Testing implemented. This includes experience in testing interfaces between multiple systems and entities.	IV. 2. b. 2	8				
11	Business Analyst(s) has three (3) years experience in researching, identifying, and documenting operational and system deficiencies and recommending new methodologies.	IV. 2. b. 3	5				
12	Business Analyst(s) has three (3) years experience as a business analyst assisting in implementing business changes through the use of technology solutions by ensuring the system changes meet the business needs.	IV. 2. b. 4	5				
13	Business Analyst(s) has three (3) years experience providing program technical assistance to technical leads during multiple phases of a project. This includes identifying project scope, business requirements, and process flows.	IV. 2. b. 5	8				
14	Business Analyst(s) has three (3) years experience creating and monitoring project schedules.	IV. 2. b. 6	5				
15	Business Analyst(s) has two (2) years experience in creating project dashboards.	IV. 2. b. 7	8				
16	Business Analyst(s) has experience with supporting the implementation of at least one system of the same size and scope as defined in this RLB, within the last three (3) years.	IV. 2. b. 8	5				
17	Business Analyst(s) has three (3) years experience in reading and interpreting Federal and State policies and regulations pertaining to eligibility programs (i.e. eligibility, Food Stamps, TANF, and Work Participation).	IV. 2. b. 9, a	1				
18	Business Analyst(s) has experience in Case Management activities by using State systems, such as, SETS and MMIS.	IV. 2. b. 9, b	1				
ORGANIZATIONAL EXPERIENCE & CAPABILITIES							
19	The vendor has included background information on the vendor, including subcontractors, if appropriate, indicating sufficient organizational experience and staffing to perform the required work. In the event that the vendor proposes the use of any subcontractors, information on the subcontractor(s) and letters of commitment are required as well	IV. 3. 1	5				

TRADE SECRET INFORMATION							
20	The review team in its comprehensive review of the vendor's proposal has determined that the proposal was free of trade secret/proprietary information as specified/restricted in the RLB. [A "no" response will disqualify the vendor's proposal and will not advance to the consideration of the vendor's Cost Proposal.]	VIII. 4.			YES	NO	
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 proposed cost? (Vendor's Grand Total Technical Score must be at least 927 points.)

Yes _____

No _____

(If "No," Vendor's proposed cost will not be considered.)

Based upon the Phase II A. Total Technical Score earned, does the vendor's proposal proceed to Phase II B. for additional consideration for demonstrating being a currently certified MBE-EDGE vendor? (Vendor's Total Phase II A. Technical Score must be at least 927 points.)

Yes _____

No _____ (If "No," Vendor's Technical Proposal will not receive further consideration and their proposed cost will not be considered.)

PHASE II B.— Additional Consideration		RLB Sec. Ref.	N O	YES (+10 pts.)
2.	MBE-EDGE Vendor--Has the vendor provided evidence that they are an MBE-EDGE vendor?	VII, B		
		PHASE II. B. TOTAL POINTS: [10 max. allowable points]		
		VENDOR'S GRAND TOTAL SCORE [Phase II A. + Phase II B. pts.]:		