

ATTACHMENT 11: Proposal Scoring Tool
Stage 1 – Administrative Review of Proposal/Format

PASS	FAIL	PROPOSAL/FORMAT REQUIREMENTS
<input type="checkbox"/>	<input type="checkbox"/>	1. Notice of Intent to Apply was timely submitted.
<input type="checkbox"/>	<input type="checkbox"/>	2. The proposal is typewritten on white bond paper using 12-point font. Left and right margins are at least one inch. Paper size shall be standard letter, 8 ½ by 11 inches. Bound in a way that enables easy page removal. Loose leaf or three-ring binders are acceptable.
<input type="checkbox"/>	<input type="checkbox"/>	3. No erasures. Errors may be crossed out and corrections printed in ink or typewritten adjacent to the error. The person signing the proposal shall initial the corrections in ink.
<input type="checkbox"/>	<input type="checkbox"/>	4. All proposals shall include the documents identified in Attachment 1: Checklist and Table of Content. Proposals not including the proper "required attachments" shall be deemed non-responsive. A non-responsive proposal is one that does not meet the basic proposal requirements and may be rejected.
<input type="checkbox"/>	<input type="checkbox"/>	5. An individual who is authorized to bind the proposing firm contractually shall sign Attachment 3: Proposal/Proposer Certification Sheet. The signature must indicate the title or position that the individual holds in the firm. An unsigned proposal may be rejected.
<input type="checkbox"/>	<input type="checkbox"/>	6. One (1) original proposal plus a minimum of five (5) paper copies of the proposal must be submitted to the MHSOAC.
<input type="checkbox"/>	<input type="checkbox"/>	7. The original proposal must be marked "ORIGINAL COPY." All documents contained in the original proposal package must have original signatures and must be signed by a person who is authorized to bind the proposing firm. All additional proposal sets may contain photocopies of the original.
<input type="checkbox"/>	<input type="checkbox"/>	8. An electronic copy of the proposal, in Word/Excel, as appropriate, on CD-ROM must be submitted to the MHSOAC.
<input type="checkbox"/>	<input type="checkbox"/>	9. All proposals must be submitted under sealed cover and received by the MHSOAC by November 1, 2013, 4:30 PM PST. Proposals received after this date and time will not be considered.
<input type="checkbox"/>	<input type="checkbox"/>	10. Proposer's Federal Employer Identification Number (FEIN); and evidence that Proposer is registered with the California Secretary of State to do business in California. If an individual, a copy is included of appropriate licensure to do business. Note: An organization must be registered with California's Secretary of State if it is a corporation that will be doing business in CA. The registration can be pending at time of bid submission, but must be complete by the time of contract award.

Stage 2 - Evaluation of Proposer's Qualifications and Proposal Narrative

	Point Value of Component	Minimum Point Value (must be achieved to pass Stage 2)		Proposal Total Score
Part One: Proposer's Qualifications	30			=
-Criterion 1: Minimum Qualifications	(21)			
-Criterion 2: Desirable Qualifications	(9)			
Part Two: Proposal Narrative	78			=
-Criterion 1: Org and Staff Quality	(18)			
-Criterion 2: Scope of Work Plan	(24)			
-Criterion 3: Creation of System	(12)			
-Criterion 4: System Piloting Plan	(12)			
-Criterion 5: Overcoming Challenges	(12)			
Total Part One and Two	108		75	

PART ONE:

Proposer’s Qualifications: Reviewers will use the scoring criteria below to rate the extent to which the Proposer has met both the minimum and desired qualifications.

Score	Descriptor
0	Does not meet qualifications
1	Meets Qualifications Minimally
2	Meets Qualifications
3	Exceeds Qualifications

Part 1 / Criterion 1: Minimum Qualification	Possible Points: 21			
1. Demonstrated successful experience in development and implementation of tracking and monitoring systems used to facilitate evaluation of mental health services and systems.	0	1	2	3
2. Demonstrated successful experience in development and implementation of quantitative research methods and large-scale evaluations geared toward quality improvement of mental health systems and the services within those systems.	0	1	2	3
3. Demonstrated successful experience working with large-scale datasets (e.g., county-wide; statewide), including methods that include full Health Insurance Portability and Accountability Act (HIPAA) compliance	0	1	2	3
4. Experience that demonstrates capability to successfully manage a project of similar scope, duration, and funding.	0	1	2	3
5. Demonstrated successful experience with culturally competent approaches to evaluation that maximize inclusion/representation of diverse groups, including un/underserved populations.	0	1	2	3
6. Demonstrated successful experience with completion of government contracts.	0	1	2	3
7. Demonstrated successful experience with use of research and evaluation to inform public policy and/or make research-based and action-oriented policy recommendations.	0	1	2	3
<u>SUBTOTAL for Part 1 / Criterion 1:</u> / 21				

Part 1 / Criterion 2: Desired Qualification	Possible Points: 9			
1. Demonstrated successful experience with MHSA evaluation	0	1	2	3
2. Demonstrated successful experience with collecting, analyzing, and interpreting California state- or county-wide data for quantitative evaluation purposes	0	1	2	3
3. Familiarity and experience working with/within California's mental health Systems of Care and the MHSA Community Services and Supports component	0	1	2	3
SUBTOTAL for Part 1 / Criterion 2:				/ 9

Part 1 FINAL SCORING	
Criterion 1 Subtotal	= (Maximum Possible Points: 21)
Criterion 2 Subtotal	= (Maximum Possible Points: 9)
TOTAL SCORE	= (Maximum Possible Points: 30)

PART TWO:

Proposal Narrative: Reviewers will use the scoring criteria below to rate the quality of Proposer responses to items required within the Proposal Narrative.

Please note the following:

- Reviewers may refer to the section on Proposer Qualifications as well as resumes and other supporting documents that were provided by the Proposer as necessary to assess and score Criterion 1 below (i.e., rating of the organization, personnel, and staffing plan).
- Reviewers shall base their scoring of Criteria 2 through 5 solely on the information provided within each relevant section of the Proposal Narrative (i.e. Plan to Complete Scope of Work, Ideas for Creation of Tracking and Monitoring System, Ideas for System Piloting, and Overcoming Challenges). Cost value/effectiveness via the Cost Proposal Sheet may also be considered while scoring of Criteria 2 through 5.

Score	Descriptor
0	Inadequate / Missing
1	Poor
2	Fair
3	Satisfactory
4	Good
5	Very Good
6	Excellent

Criterion 1: Quality of Organization and Personnel	Possible Points: 18						
1. Overall ability for proposed <u>organization</u> to carry out all aspects of this contract in a high quality, rigorous manner.	0	1	2	3	4	5	6
2. Overall ability for proposed <u>personnel</u> to carry out all aspects of this contract in a high quality, rigorous manner.	0	1	2	3	4	5	6

3. Overall adequacy of the proposed <u>staffing plan</u> to complete all aspects of this contract in a high quality, rigorous manner.	0	1	2	3	4	5	6
SUBTOTAL for Part 2 / Criterion 1:							/ 18
Criterion 2: Plan to Complete Scope of Work		Possible Points: 24					
4. Recommended steps for developing a tracking and monitoring system for adults receiving services via CSS that allows for evaluation of those clients and services (i.e. plan to complete Deliverable 1).	0	1	2	3	4	5	6
5. Recommended steps for implementing a tracking and monitoring system for adults receiving services via CSS that allows for evaluation of those clients and services (i.e. plan to complete Deliverable 2).	0	1	2	3	4	5	6
6. Recommended steps for evaluating the efficacy of services for adults who receive less comprehensive services than what is provided via FSP (i.e. plan to complete Deliverables 3 and 4).	0	1	2	3	4	5	6
7. Recommended steps for creating policy and practice recommendations for how to improve upon current CSS services, evaluation, and systems (i.e. plan to complete Deliverable 5).	0	1	2	3	4	5	6
SUBTOTAL for Part 2 / Criterion 2:							/ 24

Criterion 3: Ideas for Creation of Tracking and Monitoring System		Possible Points: 12					
8. Overall quality of Proposer ideas for the tracking, monitoring, and evaluation system for CSS services.	0	1	2	3	4	5	6
9. Ability of Proposer to consider the breadth of issues that need to be considered when designing the system (i.e., issues listed within the RFP).	0	1	2	3	4	5	6
SUBTOTAL for Part 2 / Criterion 3:							/ 12

Criterion 4: Ideas for System Piloting	Possible Points: 12						
10. Overall quality of Proposer ideas and rationale for piloting the system.	0	1	2	3	4	5	6
11. Ability of Proposer to consider the breadth of issues that need to be considered when piloting the system (i.e., issues listed within the RFP).	0	1	2	3	4	5	6
SUBTOTAL for Part 2 / Criterion 4:							/ 12

Criterion 5: Overcoming Challenges	Possible Points: 12						
12. Overall quality of Proposer ideas for overcoming obstacles that may appear within the scope of work.	0	1	2	3	4	5	6
13. Ability of Proposer to consider the breadth of issues and challenges that may be encountered.	0	1	2	3	4	5	6
SUBTOTAL for Part 2 / Criterion 5:							/ 12

Part 2 FINAL SCORING		
Criterion 1 Subtotal	=	(Maximum Possible Points: 18)
Criterion 2 Subtotal	=	(Maximum Possible Points: 24)
Criterion 3 Subtotal	=	(Maximum Possible Points: 12)
Criterion 4 Subtotal	=	(Maximum Possible Points: 12)
Criterion 5 Subtotal	=	(Maximum Possible Points: 12)
TOTAL SCORE	=	(Maximum Possible Points:78)

Stage 3 – Evaluation of Cost Proposal

Total Current Bid Amount:	\$	If lowest bid, score = 27 Otherwise, lowest bid / total bid x 27 = final score.
Lowest Bid Amount:	\$	
Final Cost Proposal Score:		

Stages 4 & 5 – Combine Scores for Stage 2 and Stage 3 and Application of Preferences

Component	Possible Point Values	Points Awarded
Part One: Proposer Qualifications (30 pts.) Part Two: Project Narrative (78 pts.)	108	
Part Three: Cost Points	27	
Total Points Possible	135	
Preference Points for Small Business		
Preference Points for DVBE		
Total Score		