

ATTACHMENT 12: Proposal Scoring and Evaluation Tools

Stage 1 –Evaluation of Proposal/Format Requirements

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 Required Section/Form Checklist. 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 ten (10) paper copies of the proposal must be submitted to DMH.
<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 package.
<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 DMH.
<input type="checkbox"/>	<input type="checkbox"/>	9. All proposals must be submitted under sealed cover and received by DMH by November 15, 2010, 4:30 PM PST. Proposals received after this date and time will not be considered.
<input type="checkbox"/>	<input type="checkbox"/>	10. Proposer has met all submission requirements.

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Stage 2- Evaluation of Proposer Minimum Qualifications

PASS	FAIL	PROPOSER MINIMUM QUALIFICATIONS
<input type="checkbox"/>	<input type="checkbox"/>	1. Experience in program evaluation—experience on multiple projects.
<input type="checkbox"/>	<input type="checkbox"/>	2. Experience in working with public community mental health systems.
<input type="checkbox"/>	<input type="checkbox"/>	3. Experience of capability to manage a project of similar duration and funding--\$1 million over 2 years.
<input type="checkbox"/>	<input type="checkbox"/>	4. Experience in advanced data management and data analysis.
<input type="checkbox"/>	<input type="checkbox"/>	5. Demonstrated experience in setting up and working with consumer/family advisory groups and working with other stakeholders, including local data experts.
<input type="checkbox"/>	<input type="checkbox"/>	6. Experience regarding cultural competence and disparities in access and in mental health systems.
<input type="checkbox"/>	<input type="checkbox"/>	7. Experience in concepts of client and family resilience and recovery.
<input type="checkbox"/>	<input type="checkbox"/>	8. California tax payer ID number or evidence that registration is pending with California Secretary of State. 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.

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Stage 3 – Evaluation of Project Narrative/Work Plan and Proposer’s Experience

Work Plan	Point Value of Component	Minimum Point Value (must be achieved to pass Stage 3)
Part One: Proposer’s Experience	30	21
Part Two: Project Narrative/Work Plan	70	49
Total Part One & Two	100	70

The Evaluation Panel will use the following criteria to score each of the technical proposal components:

Part One: Proposer’s Experience: In the Proposer’s Experience section, the following areas detailed below will be evaluated and scored. In addition to the Proposer’s Experience description responding to this requirement, the Resumes for Key Personnel will be used to evaluate this component.

Criteria	Excellent 3 points	Adequate 1-2 points	Marginal/Missing 0 point
1. Experience in program evaluation—experience on multiple projects.			
2. Experience in working with public community mental health systems.			
3. Experience of capability to manage a project of similar duration and funding--\$1 million over 2 years.			
4. Experience in advanced data management and data analysis.			
5. Demonstrated experience in setting up and working with consumer/family advisory groups			

and working with other stakeholders, including local data experts			
6. Experience regarding cultural competence, and disparities in access in mental health systems.			
7. Experience in concepts of client and family resilience and recovery.			
8. Demonstrated experience with MHSA			
Experience regarding age-specific, evidence based mental health practices			
9. Experience working with public datasets, including entering into Data Sharing Memoranda of Understanding (MOUs) for access to public data, that included full Health Insurance Portability and Accountability Act (HIPAA) compliance			

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Part Two: Project Narrative/Work Plan: In the Project Narrative and Work Plan, the following criteria will be considered:

1. Deliverable #1—Analysis of MHSA Costs and Services	Points: 20			
Criteria	Excellent 16-20 points	Adequate 10-15 points	Marginal 1-9 points	Missing 0 points
<p>The work plan for the development and timely completion of the analysis of MHSA costs and services is well developed, feasible, and appropriate. All of the required elements are addressed and it clearly details:</p> <ul style="list-style-type: none"> • The key activities and deliverables. • Understanding of the complexity of the tasks involved. • The responsible staff or subcontractor responsible for the key activities and deliverables. • The process for involving MHSOAC staff, the MHSOAC Evaluation Committee, the Client and Family Advisory Committee, and local data and research experts. • Timeline of key activities and deliverables clearly state start and end dates. 				
2. Deliverable #2—Development of Priority Indicator Report	Points: 20			
Criteria	Excellent 16-20 points	Adequate 10-15 points	Marginal 1-9 points	Missing 0 points
<p>The work plan for the development and timely completion of the development of the Priority Indicator Reports is well developed, feasible, and appropriate. All of the required elements are addressed and it clearly details:</p> <ul style="list-style-type: none"> • The key activities and deliverables. 				

<ul style="list-style-type: none"> • Understanding of the complexity of the tasks involved. • The responsible staff or subcontractor responsible for the key activities and deliverables. • The process for involving MHSOAC staff, the MHSOAC Evaluation Committee, the Client and Family Advisory Committee, and local data and research experts. • Timeline of key activities and deliverables clearly state start and end dates. 				
3. Deliverable #3—Summary and Synthesis of Evaluations	Points: 15			
Criteria	Excellent 12-15 points	Adequate 7-11 points	Marginal 1-6 points	Missing 0 points
<p>The work plan for the development and timely completion of the reports that summarize and synthesize existing evaluations and studies with a particular focus on the impact of MHSA on consumer outcome and MHSA values including recommendations for next steps and resources needed is well developed, feasible, and appropriate. All of the required elements are addressed and it clearly details:</p> <ul style="list-style-type: none"> • The key activities and deliverables. • Understanding of the complexity of the tasks involved. • The responsible staff or subcontractor responsible for the key activities and deliverables. • The process for involving MHSOAC staff, the MHSOAC Evaluation Committee, the Client and Family Advisory Committee, and local data and research experts. • Timeline of key activities and deliverables clearly state start and end dates 				

4. Deliverable #4—Final Report	Points: 15			
Criteria	Excellent 12-15 points	Adequate 7-11 points	Marginal 1-6 points	Missing 0 points
<p>The work plan for the development and timely completion of the final written report is well developed, feasible, and appropriate. All of the required elements are addressed and it clearly details:</p> <ul style="list-style-type: none"> • The key activities and deliverables. • Understanding of the complexity of the tasks involved. • The responsible staff or subcontractor responsible for the key activities and deliverables. • The process for involving MHSOAC staff, the MHSOAC Evaluation Committee, the Client and Family Advisory Committee, and local data and research experts. • Timeline of key activities and deliverables clearly state start and end dates. 				
Maximum Points Possible: 70			TOTAL SCORE :	

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Stage 4 – Evaluation of Cost Proposal

Work Plan	Point Value of Component	Points Awarded (See Section M, #4 for details)
50% of cost is allocated to Deliverables 1 and 2	Pass/Fail	
Part Three: Cost Points	40	

Stage 5 & 6 – Combine Scores for Parts 1, 2, and 3 and Application of Preferences

Work Plan	Point Value of Component	Points Awarded
Part One: Proposer's Experience	30	
Part Two: Project Narrative/Work Plan	70	
Part Three: Cost Points	40	
Total Points Possible	140	
Preference Points for Small Business		
Preference Points for DVBE		
Total Score		