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

	Point Value of Component	Minimum Point Value (must be achieved to pass Stage 2 and advance to Stage 3)		Stage 2 Total Score
Part 1: Proposer's Qualifications	**40**			**=**
-Section 1: Minimum Qualifications	PASS			
-Section 2: Desirable Qualifications	(40)			
Part 2: Proposal Narrative	**300**			**=**
-Criterion 1: Org and Staff Quality	(75)			
-Criterion 2: Scope of Work Plan	(100)			
-Criterion 3: Data Collection T/TA	(75)			
-Criterion 4: Overcoming Challenges	(50)			
Total Combined - Part 1 and 2	**340**	**238**		**=**

STAGE 2 / PART 1 – Proposer's Qualifications

Minimum Qualifications (Part 1 / Section 1):

Reviewers will assign a "pass" or "fail" rating to the list of minimum qualifications below. The Proposer must receive a "pass" rating for each minimum qualification listed to proceed to Part 1 / Section 2 scoring (see next page). If the Proposer does not receive a "pass" rating for each minimum qualification, the scoring process will end.

Part 1 / Section 1: Minimum Qualification	PASS	FAIL
1. 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.	☐	☐
2. Demonstrated successful experience working with large datasets (e.g., county-wide; statewide), including, but not limited to, methods to ensure proper handling of confidential and protected health information (i.e., Health Insurance Portability and Accountability Act (HIPAA) compliance).	☐	☐
3. Experience that demonstrates capability to successfully manage a project of similar scope, duration, and funding.	☐	☐
4. Demonstrated successful experience with culturally competent approaches to evaluation that maximize inclusion/representation of diverse groups, including un/underserved populations.	☐	☐
5. Demonstrated successful experience with completion of government contracts.	☐	☐
6. Demonstrated successful experience with use of research and evaluation to inform public policy and/or make research-based and action-oriented policy recommendations.	☐	☐
7. Demonstrated successful experience with creating and disseminating/providing resources (e.g., webinars, toolkits) at various levels (i.e., statewide, county, provider) to individuals/entities responsible for providing mental health services and/or evaluating those services for quality improvement purposes.	☐	☐
Proposer Meets Minimum Qualifications? YES ☐ NO ☐ If yes, advance to scoring Desirable Qualifications (Part 1, Section 2)		

Desirable Qualifications (Part 1 / Section 2):

Reviewers will use the scoring criteria below to rate the extent to which the Proposer has demonstrated desired qualifications.

Score	**Description**
0	Proposer did not demonstrate this desirable qualification.
5	Proposer minimally demonstrated this desirable qualification.
10	Proposer fully demonstrated this desirable qualification.

Part 1 / Section 2: Desired Qualification	Possible Points: 40		
1. Demonstrated successful experience with MHSA evaluation.	0	5	10
2. Demonstrated successful experience with evaluating recovery of individuals in and/or the recovery orientation of behavioral health (i.e., mental health, substance use disorders) programs/services/systems.	0	5	10
3. Demonstrated successful experience with collecting, analyzing, and interpreting California state- or county-wide data for quantitative evaluation purposes.	0	5	10
4. Familiarity and experience working with/within California's mental health Systems of Care and the MHSA Community Services and Supports component.	0	5	10
TOTAL for Part 1 / Section 2: / 40			

STAGE 2 / PART 2 – 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 4 solely on the information provided within each relevant section of the Proposal Narrative (i.e. Plan to Complete Scope of Work, Data Collection Training and Technical Assistance Plan, and Overcoming Challenges). Cost value/effectiveness via the Cost Proposal Sheet may also be considered while scoring of Criteria 2 through 4.

Score	Description
0	Missing
5	Poor
10	Fair
15	Satisfactory
20	Very Good
25	Excellent

Part 2 / Criterion 1: Quality of Organization and Personnel	Possible Points: 75					
1. Overall ability for proposed organization to carry out all aspects of this contract in a high quality, rigorous manner.	0	5	10	15	20	25
2. Overall ability for proposed personnel to carry out all aspects of this contract in a high quality, rigorous manner.	0	5	10	15	20	25
3. Overall adequacy of the proposed staffing plan to complete all aspects of this contract in a high quality, rigorous manner.	0	5	10	15	20	25
SUBTOTAL for Part 2 / Criterion 1: / 75						

Part 2 / Criterion 2: **Plan to Complete Scope of Work**	Possible Points: 100					
4. Steps for identifying, describing, and assessing existing measures of recovery orientation, including a full description of those measures and assessment of their utility for use in contexts within California's public community-based mental health system (i.e. plan to complete Deliverable 1).	0	5	10	15	20	25
5. Steps for evaluating the recovery orientation of services/programs delivered within the CSS Component adult system care, and how the sample of counties participating in the evaluation will be identified (i.e. plan to complete Deliverable 2).	0	5	10	15	20	25
6. Steps for creating recommendations and resources for evaluating recovery orientation (e.g., toolkit) and recommendations and resources promoting practices that encourage recovery orientation (i.e. plan to complete Deliverables 4 and 5).	0	5	10	15	20	25
7. Steps for creating policy and practice recommendations for ensuring, maintaining, and strengthening the recovery orientation of services/programs (i.e. plan to complete Deliverable 6).	0	5	10	15	20	25
SUBTOTAL for Part 2 / Criterion 2: / 100						

Part 2 / Criterion 3: **Data Collection Training and Technical Assistance Plan**	Possible Points: 75					
8. Overall quality of Proposer plan for how he/she/they would support participating counties/providers in the administration and completion of possible data collection methods (i.e., measurement(s) of recovery orientation).	0	5	10	15	20	25
9. Ability of the Proposer to describe how collected data could be transferred to the Contractor in a secure fashion).	0	5	10	15	20	25
10. Ability of the Proposer to provide examples of past trainings and technical assistance that would be comparable, and the outcome of various techniques used to provide such training and technical assistance.	0	5	10	15	20	25
SUBTOTAL for Part 2 / Criterion 3: / 75						

Part 2 / Criterion 4: **Overcoming Challenges**	Possible Points: 50					
11. Overall quality of Proposer ideas for overcoming obstacles that may appear within the scope of work.	0	5	10	15	20	25
12. Ability of Proposer to consider the breadth of issues and challenges that may be encountered.	0	5	10	15	20	25
SUBTOTAL for Part 2 / Criterion 4: / 50						

STAGE 2 / PART 2 FINAL SCORING SHEET

Criterion 1 Subtotal	=	(Maximum Possible Points: 75)
Criterion 2 Subtotal	=	(Maximum Possible Points: 100)
Criterion 3 Subtotal	=	(Maximum Possible Points: 75)
Criterion 4 Subtotal	=	(Maximum Possible Points: 50)
TOTAL SCORE	**=**	**(Maximum Possible Points: 300)**

Stage 3 – Reference Interviews (RI)

	Point Value of Component		Stage 3 Total Score
Minimum Point Value (MPV)	**≥ 238**		**=**
Reference Interviews (RI)Total	**60**		**=**
-Reference #1	(30)		
-Reference #2	(30)		
Total Combined – MPV and RI	**400**		**=**

STAGE 3 - Reference Interviews (RI)

Once Minimum Point Value (i.e., 238 total combined points in Stage 2 - Evaluation of Proposer's Qualifications and Proposal Narrative) is obtained, the Reviewers will collectively contact two of the four references provided within the Proposer Qualifications at random by telephone. Each reference will be asked the six questions listed below.

Reviewers will use the scoring criteria below to rate the endorsement of the Proposer for each question:

Score	Description
1	**Low** Endorsement of the Proposer
2	**Low to Medium** Endorsement of the Proposer
3	**Medium** Endorsement of the Proposer
4	**Medium to High** Endorsement of the Proposer
5	**High** Endorsement of the Proposer

Interview Questions – REFERENCE #1 – Name:	Possible Points: 30				
1. Please describe how well the Proposer was able to work with large datasets and how the Proposer was able to ensure proper handling of confidential and protected health information when working with those large datasets.	1	2	3	4	5
2. Please describe the Proposer's capability to successfully manage a project, including, but not limited to, the ability of the Proposer to met deadlines, deliver quality products, and adhere to agreed upon timelines and budgets.	1	2	3	4	5
3. Please describe the Proposer's ability to understand and use culturally competent approaches to evaluation that maximizes inclusion/representation of diverse groups, including un/underserved populations.	1	2	3	4	5
4. Please describe your experience working with the Proposer to successfully complete a contract and/or report.	1	2	3	4	5
5. Please describe the Proposer's ability to make use of research and evaluation to inform public policy and/or to make research-based and action-oriented policy recommendations.	1	2	3	4	5
6. Would you work with the Proposer again? Why or why not?	1	2	3	4	5
SUBTOTAL for Stage 3 / Reference #1: / 30					

Interview Questions – REFERENCE #2 - Name:	Possible Points: 30				
1. Please describe how well the Proposer was able to work with large datasets and how the Proposer was able to ensure proper handling of confidential and protected health information when working with those large datasets.	1	2	3	4	5
2. Please describe the Proposer's capability to successfully manage a project, including, but not limited to, the ability of the Proposer to met deadlines, deliver quality products, and adhere to agreed upon timelines and budgets.	1	2	3	4	5
3. Please describe the Proposer's ability to understand and use culturally competent approaches to evaluation that maximizes inclusion/representation of diverse groups, including un/underserved populations.	1	2	3	4	5
4. Please describe your experience working with the Proposer to successfully complete a contract and/or report.	1	2	3	4	5
5. Please describe the Proposer's ability to make use of research and evaluation to inform public policy and/or to make research-based and action-oriented policy recommendations.	1	2	3	4	5
6. Would you work with the Proposer again? Why or why not?	1	2	3	4	5
SUBTOTAL for Stage 3 / Reference #2:					**/ 30**

STAGE 3 / REFERENCE INTERVIEW FINAL SCORING SHEET

Reference #1 Subtotal	=	(Maximum Possible Points: 30)
Reference #2 Subtotal	=	(Maximum Possible Points: 30)
TOTAL SCORE	**=**	**(Maximum Possible Points: 60)**