

APPENDIX I: NOTICE OF INTENT TO SUBMIT A REPLY

Name of Authorized Official:	
Title of Authorized Official:	
Signature of Authorized Official:	
Date:	
Address:	
City, State, Zip:	
Telephone No:	
Facsimile No:	
E-mail Address:	

APPENDIX II: CERTIFICATE OF SIGNATURE AUTHORITY

Check below and complete Section A or Section B	
<input type="checkbox"/>	Vendor is not a sole proprietorship (Complete Section A)
<input type="checkbox"/>	Vendor is a sole proprietorship (Complete Section B)
Section A	
<p>I, _____ (name), hold the office or position of _____ (title) with _____ (legal name of Vendor) and have authority to make official representations by said Vendor regarding its official records and hereby state that my examination of the Vendor's records show that _____ (name) currently holds the office or position of _____ (title) with the Vendor and currently has authority to make binding representations to the Department and sign all documents submitted on behalf of the above-named Vendor in response to ITN # _____, and, in so doing, to bind the named Vendor to the statements made therein.</p>	
Dated: _____	
Signature: _____	
Printed Name: _____	
Title: _____	
<p>NOTE: In lieu of the above, the Vendor may submit a corporate resolution or other duly executed certification issued in the Vendor's normal course of business to prove signature authority of the named Authorized Representative.</p>	
Section B	
<p>I, _____ (name) am a sole proprietor, personally doing business in the name of _____ (name of Vendor), and will be personally bound by the Proposal submitted in response to ITN # _____.</p>	
Dated: _____	
Signature: _____	
Printed Name: _____	

APPENDIX III: VENDOR'S CERTIFICATIONS

MANDATORY CERTIFICATIONS		
MASTER CERTIFICATION		
<p>As the person named in the Certificate of Signature Authority as the Authorized Representative of the Vendor, _____ (legal name of Vendor), I confirm that I have fully informed myself of all terms and conditions of ITN # _____ (the ITN), the facts regarding the Reply submitted by the Vendor in response to the ITN and the truth of each statement contained in Certifications (a) through (m) and certify, by checking the applicable "true" or "false" box below and affixing my signature hereto, that each statement in each checked certification is "true" or "false" as indicated.</p>		
<p>Check the applicable box next to the title to each certification:</p>		
True	False	
		a. Certification of Binding Reply and Acceptance of Terms of ITN and Contract Document
		b. Certification of Representations Per Section 9 of PUR 1001
		c. Certification of Authority to Do Business in Florida
		d. Statement of No Involvement
		e. Conflict of Interest Statement (Non-Collusion)
		f. Certification Regarding Subcontractors and Other Providers
		g. Certification Regarding Lobbying
		h. Certification Regarding Scrutinized Companies List
		i. Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion for Contracts/subcontracts
		j. Certification Regarding Prior Contractual Obligations
		k. Certification of Representations Per sections 287.133, and 287.134, F.S.
		l. Certification of a Drug Free Workplace
<p>The content of each certification named above, set forth below, is incorporated into this Master Certification as if fully recited herein and, for each certification marked "true" above, the below signature is deemed to be affixed to each such certification. I agree that any certification not marked above will be deemed "false."</p>		
<p>Signature of Authorized Representative:</p>		<p>Date:</p>
<p>a. Certification of Binding Reply and Acceptance of Terms of ITN and Contract Document</p>		
<p>By checking the "True" box in the Master Certification and signing the same, I hereby certify that the Vendor's Reply is submitted in good faith in response to the Department of Children and Families Invitation to Negotiate (the ITN) and is binding on the Vendor in accordance with the terms of the ITN, that I have read, understood and agree with the terms and conditions of the ITN and, if awarded any contract as a result of the ITN, the Vendor will comply with the requirements, terms, and conditions stated in the ITN and the contract document. The Vendor further agrees that any intent by the Vendor to deviate from the terms and conditions set forth therein may result, at the Department's exclusive determination, in rejection of the reply.</p>		

b. Certification of Representations Per Section 9 of Form PUR 1001

By checking the "True" box in the Master Certification and signing the same, I hereby certify acknowledgement all matters set forth in Section 9 of PUR 1001.

c. Certification of Authority to Do Business in Florida

By checking the "True" box in the Master Certification and signing the same, I hereby certify that the Vendor is an existing legal entity and satisfies all licensing and registration requirements of state law authorizing it to do business within the State of Florida.

d. Statement of No Involvement

By checking the "True" box in the Master Certification and signing the same, I hereby certify that no member of this firm or any person having interest in this firm has:

Been awarded a contract that was procured using procedures other than those described in subsections 287.057 (1-3), Florida Statutes, to perform a feasibility study of the potential implementation of a subsequent contract to support this project; Participated in drafting of a solicitation for this specific project; or

Developed a program for future implementation of this project.

e. Conflict of Interest Statement (Non-Collusion)

By checking the "True" box in the Master Certification and signing the same, I hereby certify that all persons, companies, or parties interested in the Invitation to Negotiate as principals are named therein, that the Vendor's Reply is made without collusion with any other person, persons, company, or parties submitting a reply; that it is in all respect made in good faith; and as the signer of the reply, I have full authority to legally bind the Vendor to the provisions of this reply.

f. Certification Regarding Subcontractors and Other Providers

By checking the "True" box in the Master Certification and signing the same, I hereby certify the Vendor's Agreement to the following: 1) during the negotiation phase the Department may request, and any vendor submitting a reply to this ITN may propose, that such vendor use any of the subcontractors or providers used or identified by any other vendor submitting a reply to this ITN; and 2) that the Vendor waives any contract provision to the contrary.

g. Certification Regarding Lobbying

By checking the "True" box in the Master Certification and signing the same, I hereby certify, to the best of my knowledge and belief,;

(1) No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or an employee of any agency, a member of congress, an officer or employee of congress, or an employee of a member of congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of congress, an officer or employee of congress, or an employee of a member of congress in connection with this federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, Title 31, United States Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

h. Certification Regarding Scrutinized Companies List

By checking the "True" box in the Master Certification and signing the same, I hereby certify, the Vendor is not listed on either the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List. Both lists are created pursuant to section 215.473, Florida Statutes. I understand section 287.135, Florida Statutes, prohibits Florida state agencies from contracting with companies on either list, for goods or services over \$1,000,000, and pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject company to civil penalties, attorney's fees, and/or costs.

i. Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion for Contracts/subcontracts

By checking the "True" box in the Master Certification and signing the same, I hereby certify, in accordance with the debarment and suspension instructions listed below, the Vendor certifies neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this contract/subcontract by any federal department or agency. Where the prospective vendor is unable to certify to any of the statements in this certification, such prospective vendor shall attach an explanation to this certification.

INSTRUCTIONS REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION FOR CONTRACTS/SUBCONTRACTS

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, signed February 18, 1986. The guidelines were published in the May 29, 1987 Federal Register (52 Fed. Reg., pages 20360-20369). (See 2 C.F.R. Part 180)

- (1) Each provider whose contract/subcontract equals or exceeds \$25,000 in federal moneys must sign this certification prior to execution of each contract/subcontract. Additionally, providers who audit federal programs must also sign, regardless of the contract amount. The Department of Children and Families cannot contract with these types of vendors if they are debarred or suspended by the federal government.
- (2) This certification is a material representation of fact upon which reliance is placed when this contract/subcontract is entered into. If it is later determined that the signer knowingly rendered an erroneous certification, the Federal Government may pursue available remedies, including suspension and/or debarment.
- (3) The vendor shall provide immediate written notice to the contract manager at any time the vendor learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- (4) The terms "debarred," "suspended," "person," "principal," and "voluntarily excluded," as used in this certification, have the meanings set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the department's contract manager for assistance in obtaining a copy of those regulations.
- (5) The vendor agrees by submitting this certification that, it shall not knowingly enter into any subcontract with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this contract/subcontract unless authorized by the Federal Government.
- (6) The vendor further agrees by submitting this certification that it will require each subcontractor of this contract/subcontract, whose payment will equal or exceed \$25,000 in federal moneys, to submit a signed copy of this certification.
- (7) The Department of Children and Families may rely upon a certification of a vendor that it is not debarred, suspended, ineligible, or voluntarily excluded from contracting/subcontracting unless it knows that the certification is erroneous.

This signed certification must be kept in the contract file. Subcontractor's certification must be kept at the vendor's business location.

j. Certification Regarding Prior Contractual Obligations

By checking the "True" box in the Master Certification and signing the same, I hereby certify the Vendor has not:

- (1) Failed to correct to the satisfaction of the Department any unsatisfactory performance in a previous contract after Department notice of unsatisfactory performance;
- (2) Had a contract terminated by the Department for cause; and
- (3) Failed to sign a certification regarding debarment, suspension, ineligibility and voluntary exclusion contract/subcontracts (APPENDIX III) prior to contract execution.

k. Certification of Representations Per Sections 287.133 and 287.134, Florida Statutes

By checking the "True" box in the Master Certification and signing the same, I hereby certify the Vendor is not listed on the Convicted Vendors List created and maintained pursuant to section 287.133, Florida Statutes, or on the Discriminatory Vendors List created and maintained pursuant to section 287.134, Florida Statutes.

l. Certification of a Drug Free Workplace

By checking the "True" box in the Master Certification and signing the same, I hereby certify the Vendor currently maintains a drug-free workplace environment in accordance with section 287.087, Florida Statutes, and will continue to promote this policy through implementation of that section.

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TIE BREAKING CERTIFICATIONS

Statutory Preferences When Awarding Contracts

Various provisions of Chapters 287 and 295, F.S., provide qualifying Vendors the advantage of "tie breakers" whenever two or more bids, proposals, or replies received by an agency are equal with respect to price, quality, and service. In order to take advantage of the below "tie breakers," a Vendor who meets the statutory qualifications for one or more of these "tie breakers" must certify that it qualifies for the cited preference. Completion of the certification is optional for qualifying Vendors, however, a Vendor waives all rights to consideration of a "tie breaker" if it fails to submit the certification on or before the deadline to submit its bid, proposal or reply.

MASTER CERTIFICATION - TIE-BREAKING CERTIFICATIONS

As the Authorized Representative of the Vendor, _____ (legal name of Vendor), I confirm that I have fully informed myself of all terms and conditions of ITN # _____ (the ITN), the facts regarding the Reply submitted by the Vendor in response to the ITN and the truth of each statement contained in Certifications (n) through (p) and certify, by checking one or more of the boxes below and affixing my signature hereto, that each statement in each checked certification is true.

Check the box next to the title to each certification that is true:

- | | |
|--------------------------|---|
| <input type="checkbox"/> | m. Certification of a Certified Minority Business Enterprise |
| <input type="checkbox"/> | n. Certification of a Service Disabled Veteran's Business Enterprise |
| <input type="checkbox"/> | o. Certification of a Florida Business |
| <input type="checkbox"/> | p. Certification of a Foreign Manufacturer with a Factory in Florida |

The content of each certification named above, set forth below, is incorporated into this Master Certification as if fully recited herein and, for each certification marked "true," above, the below signature is deemed to be affixed to each such certification. I agree that any certification not marked above will be deemed "false."

Signature of Authorized Representative:

Date:

m. Certification of a Certified Minority Business Enterprise

By checking the "True" box in the Master Certification - Tie-Breaking Certifications and signing the same, I hereby certify that my organization is a Certified Minority Business Enterprise in accordance with section 287.0943, Florida Statutes.

n. Certification of a Florida Certified Veteran's Business Enterprise

By checking the "True" box in the Master Certification - Tie-Breaking Certifications and signing the same, I hereby certify that my organization is a Service Disabled Veterans Business Enterprise in accordance with section 295.187, Florida Statutes.

o. Certification of a Florida Business

By checking the "True" box in the Master Certification - Tie-Breaking Certifications and signing the same, I hereby certify that my organization's principal place of business is located within Florida in accordance with section 287.084, Florida Statutes.

p. Certification of a Foreign Manufacturer with a Factory in Florida

By checking the "True" box in the Master Certification - Tie-Breaking Certifications and signing the same, I hereby certify that my manufacturing organization has a factory in Florida that employs over 200 employees working in Florida in accordance with section 287.092, Florida Statutes.

APPENDIX IV: QUESTION SUBMITTAL FORM

Each Vendor shall complete the form provided based on its questions relating to this ITN. The completed form shall be submitted in accordance with the instructions provided in **Section 2.7** of the ITN. The electronic response must be submitted as a Microsoft Word 2007 version file format. This form may be expanded as needed to facilitate response to this requirement.

Legal Vendor Name: _____

Question Number	ITN Section Number	ITN Page Number	Question/Comment
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

[Add rows as necessary.]

*Signature of Authorized Representative

*Name and Title of Authorized Representative

*This individual must have the authority to bind the Vendor.

APPENDIX V: MANDATORY REQUIREMENTS CHECKLIST

MANDATORY CRITERIA CHECKLIST for: (enter name & reference # of solicitation)		
Print Vendor's Name (Agency):		
Print Name of Department Reviewer (Procurement Manager):		
Signature of Department Reviewer:		Date:
Print Name of Department Witness:		
Signature of Department Witness:		Date:
1. Was the reply received by the date and time specified in the ITN and at the specified address? <input type="checkbox"/> (YES) = Pass Comments: <input type="checkbox"/> (NO) = Fail		
2. Does the reply include the following?		
a.	Signed Certificate of Signature Authority, naming the vendor and its Authorized Representative (see note at bottom of Section A of Appendix II for acceptable alternatives)	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
b.	Master Certification, including the names of vendor and its Authorized Representative and signature of the Authorized Representative.	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
3. Is the "True" box in the Master Certification checked for each of the following?		
a.	Certification of Binding Reply and Acceptance of Terms of ITN and Contract Document	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
b.	Certification of Representations Per Section 9 of PUR 1001	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
c.	Certification of Authority to Do Business in Florida	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
d.	Statement of No Involvement	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
e.	Conflict of Interest Statement (Non-Collusion)	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
f.	Certification Regarding Subcontractors and Other Providers	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
g.	Certification Regarding Lobbying	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
h.	Certification Regarding Scrutinized Companies List	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
i.	Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion for Contracts/subcontracts	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
j.	Certification Regarding Prior Contractual Obligations	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
k.	Certification of Representations Per Sections 287.133 and 287.134, F.S.	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
l.	Certification of a Drug Free Workplace	<input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail
The reply includes the following "tie breaker" certification documents:		
Appendix III l. – Certification of a Drug Free Workplace		<input type="checkbox"/> Yes <input type="checkbox"/> No
Appendix III m. -Certification of a Certified Minority Business Enterprise		<input type="checkbox"/> Yes <input type="checkbox"/> No
Appendix III n. - Certification of a Service Disabled Veteran's Business Enterprise		<input type="checkbox"/> Yes <input type="checkbox"/> No
Appendix III o - Certification of a Florida Business		<input type="checkbox"/> Yes <input type="checkbox"/> No
Appendix III p - Certification of a Foreign Manufacturer with a Factory in Florida		<input type="checkbox"/> Yes <input type="checkbox"/> No
Comments:		
4. Has the Department verified that the Vendor is not on the Convicted Vendor List or the Discriminatory Vendor List? <input type="checkbox"/> (YES) = Pass <input type="checkbox"/> (NO) = Fail		
Comments:		

APPENDIX VI: BUDGET AND BUDGET NARRATIVE INSTRUCTIONS

The budget should display all costs that will be paid by the Department for the delivery of services resulting from this ITN. Use the Budget format from Appendix V to list the amounts for line items that will be expended during the budget period. The format displays the suggested line items to be covered for this project; other line items may be added, if necessary. "Miscellaneous" and "Other" are not acceptable line items.

In addition to, and in support of the Budget, a detailed Budget Narrative should be included below the budget template. The Budget Narrative should provide a description for each line item, and when applicable include the methodology used to calculate the total for the line item. Documentation must show the percentage of costs being charged to the Department, if the vendor has another source of income providing funding to this project. Items requiring *estimated* costs must be accompanied by sufficient documentation or explanation to support the estimation. An estimated number of units must be provided for each line item calculated using a unit rate x unit cost calculation. In addition:

- **Salaries** provided must be comparable with similar positions in the surrounding labor market and a job description must be provided for each position listed. Include the number of FTEs that will be funded in whole or in part by this project.
- **Fringe benefits** must display the calculation of costs, specifically the percentages or rates for each benefit being charged to this project.
- **Staff Travel** is reimbursed as specified by Department travel policies and procedures in CFOP 40-1 and state statute (s. 112.061, F.S.).
- **Office expenses** should be based on prior history, a reasonable estimated monthly expense or written vendor policy.
- **Rental or use of space** must indicate geographic location, approximate square footage and the rate per square footage.
- **Rental equipment** necessary to carry out the delivery of services must include the unit cost (per month) and the number of months the item(s) will be used.
- **Insurance** costs must provide sufficient documentation to explain the percentage of cost being charged to this project and/or the calculation of the cost and the insurance coverage being provided.
- **Membership fees and subscriptions** necessary for the delivery of services must show the estimated costs and number of units projected.
- **Client education and training tools** must provide the types of services to be provided, the estimated number of clients to be served, and the estimated unit cost of each service.
- **Information Resource Technology (IRT)** includes computers, monitors and other technology items costing less than \$1,000 each and must include a brief description of the item(s) to be purchased, the unit cost for each item and justification for each item. For recurring costs, must show the estimated unit cost for each recurring cost associated with the delivery of services, including internet access, computer/network/printer maintenance, etc.
- **Financial audits** being covered in part or in whole with project funds must show the rate used to calculate this cost or the percentage of cost being allocated to this project.

- **Office equipment (non-OCO)** to be purchased under this contract (costing less than \$1,000 each) for use under this project must show the number of units to be purchased, the estimated cost for each unit and justification for the item(s) being purchased. Purchased must be estimated in accordance with the State's guidelines found at http://www.fldfs.com/aadir/reference%5Fguide/reference_guide.htm#furniture
- **Indirect costs** being charged to the project must show the percentage of funding required by the vendor to carry out the common or joint tasks covered by this line item. A summary of the expenditures covered by these funds is required.

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**APPENDIX VII: BUDGET AND BUDGET NARRATIVE
FY (INSERT DATES) - FY (INSERT DATES)**

<i>BUDGET CATEGORY Line Item</i>	<i>% Allocated to this Agreement</i>	<i>Amount</i>
<i>PERSONNEL CATEGORY:</i>	<i>%</i>	<i>\$</i>
<i>A. Salaries</i>	<i>%</i>	<i>\$</i>
<i>A1. Supervisor</i>	<i>%</i>	<i>\$</i>
<i>A2. IV-E Trainer 1</i>	<i>%</i>	<i>\$</i>
<i>A3. IV-E Trainer 2</i>	<i>%</i>	<i>\$</i>
<i>A4.</i>	<i>%</i>	<i>\$</i>
<i>A5.</i>	<i>%</i>	<i>\$</i>
<i>B. Fringe Benefits</i>	<i>%</i>	<i>\$</i>
<i>TRAVEL CATEGORY:</i>	<i>%</i>	<i>\$</i>
<i>C. Staff Travel</i>	<i>%</i>	<i>\$</i>
<i>D.</i>	<i>%</i>	<i>\$</i>
<i>EXPENSE CATEGORY:</i>	<i>%</i>	<i>\$</i>
<i>E. Utilities</i>	<i>%</i>	<i>\$</i>
<i>F. Telephone</i>	<i>%</i>	<i>\$</i>
<i>G. Postage/Shipping</i>	<i>%</i>	<i>\$</i>
<i>H. Copies/Printing</i>	<i>%</i>	<i>\$</i>
<i>I. Office Supplies</i>	<i>%</i>	<i>\$</i>
<i>J. Rental or Use of Office Space</i>	<i>%</i>	<i>\$</i>
<i>K. Rental Equipment</i>	<i>%</i>	<i>\$</i>
<i>L. Information Resource Technology</i>	<i>%</i>	<i>\$</i>
<i>INDIRECT COSTS CATEGORY:</i>	<i>%</i>	<i>\$</i>
<i>M. Indirect Costs (% of direct costs)</i>	<i>%</i>	<i>\$</i>
TOTAL PROJECT BUDGET:		\$

**Sample Categories and line items - rows can be added and deleted as needed.*

BUDGET NARRATIVE (Sample):

A. Salaries - The annual salaries listed for all staff involved with this project ...

A1. Supervisor - The individual responsible for the overall supervision of ... paid an annual salary of

A2. IV-E Trainer 1 - Responsible for providing IV-E training ... paid XX annual rate of ...

A3. IV-E Trainer 2 -

A4.

B. Fringe Benefits -

APPENDIX VIII: EVALUATION MANUAL

**State of Florida
Department of Children and Families**



**ITN# - 20181801CPINER
Child Protective Investigations (CPI) Training Program**

Evaluation Manual Template

Evaluator Name: _____

Vendor Name: _____

Date of Reply Evaluation: _____

Evaluator Signature: _____

1 GENERAL INSTRUCTIONS

1.1 Each evaluator will evaluate the programmatic/financial reply and the oral presentation for all vendor replies that pass the mandatory criteria. Each evaluation criterion must be scored. Fractional values will not be accepted. If an evaluator score sheet(s) is missing points/scores, it will be returned for completion. Scoring must reflect the evaluator's independent evaluation of the reply to each evaluation criterion.

1.2 All evaluation team members will assign raw points for each evaluation criterion using the scale of 0 to 4. Each evaluator shall assign a score for each evaluation criterion based upon his/her assessment of the reply. The assignment of an individual score must be based upon the following description of the point scale:

Category	IF, in your judgment the reply demonstrates and/or describes...	...assign points as ...
Excellent	...extensive competency, proven capabilities, an outstanding approach to the subject area, innovative, practical and effective solutions, a clear and complete understanding of all areas, full responsiveness, a clear and comprehensive understanding of the requirements and plan for the unforeseen.	4
Competent	...clear competency, consistent capability, a reasoned approach to the subject area, feasible solutions, a generally clear and complete description of areas, extensive but incomplete responsiveness and a sound understanding of the requirements.	3
Adequate	...fundamental competency, adequate capability, a basic approach to the subject area, apparently feasible but somewhat unclear solutions, a weak description in some areas, partial responsiveness, a fair understanding of the requirements, a lack of experience/skills in some areas.	2
Minimal	...little competency, minimal capability, an inadequate approach to the subject area or infeasible and/or ineffective solutions, somewhat unclear; incomplete and /or non-responsive, a lack of understanding of the requirements or a lack of demonstrated experience and skills.	1
Insufficient	...significant or complete lack of understanding, an incomprehensible approach, a significant of complete lack of skill and experience and extensive non-responsiveness.	0

1.3 When completing score sheets evaluators should record references to the sections of the Invitation to Negotiate (ITN) and the written reply materials which most directly pertain to the criterion and upon which their scores were based. More than one section may be recorded. Evaluators should not attempt an exhaustive documentation of every bit of information considered but only key information. In general, the reference statements should be brief. If the reply does not address an evaluation criterion, evaluators should indicate "not addressed" and score it accordingly.

1.4 Each evaluator has been provided a copy of the ITN, including its appendices, any ITN amendments, and vendor written inquiries and the written responses provided by the Department. Each evaluator will also be provided with a copy of each programmatic reply which should be evaluated and scored according to the instructions provided in the solicitation and the evaluation manual.

1.5 Replies shall be independently scored by each member of the evaluation team. No collaboration is permitted during the scoring process. The same scoring principles must be applied to every reply received, independent of other evaluators. Evaluators should work carefully to be as thorough as possible in order to ensure a fair and open competitive procurement. No attempt by Department personnel or others, including other evaluators, to influence an evaluator's scoring shall be tolerated.

1.6 If any attempt is made to influence an evaluator, the evaluator must immediately report the incident to the Procurement Manager. If such an attempt is made by the Procurement Manager, the evaluator must immediately report the incident to the Inspector General.

1.7 The Procurement Manager will conduct reference checks via telephone interviews.

1.8 Only the rating sheets provided should be used. No additional notes or marks should appear elsewhere in the evaluation manual.

1.9 Evaluators may request assistance in understanding evaluation criteria and replies only from the Procurement Manager/Procurement Advisors.

1.10 Questions related to the solicitation and the evaluations of the reply should be directed only to:

Procurement Manager: Lori McCray

Address: 210 N. Palmetto Ave. Suite 447-D Daytona Beach, FL 32114

Email Address: lori.mccray@myflfamilies.com

1.11 After each evaluator has completed the scoring of each programmatic/financial reply and Oral Presentation, the points are then submitted to the Procurement Manager for compilation. The Procurement Manager will average the total programmatic point scores by each evaluator to calculate the points awarded for each section.

1.12 Following completion of the independent evaluations of the replies and presentations, the Procurement Manager will hold a meeting to validate evaluator scoring. The purpose of the meeting is to ensure that their individual evaluation scores were captured correctly when preparing the total programmatic scores.

2 QUALITATIVE CRITERIA

Evaluators shall assign scores to each of the replies and presentations received by the Department based on the following criteria:

- Vendor's articulation of their project approach and solution, and the ability of the services and solution to meet the Department's needs, the requirements of this ITN.
- The innovation of the services, and options and/or solutions presented.
- Vendor references, and track record implementing similar services to this ITN

- Experience and skills of proposed staff relative to the proposed approach and services.

3 PROGRAMMATIC & FINANCIAL REPLY POINT VALUES

Programmatic Criteria	Maximum Points
1. 4.2.4 Executive Overview	
Agency Overview – describes the agency, type of business, number of years in business, what uniquely qualifies the vendor for the work described in this ITN. Any potential or known conflicts of interest?	3
Agency Mission – agency’s mission, principles, values, vision and described how this supports the delivery of the work described in ITN.	3
Service History – agency’s history delivering training services/programs. Successes and deficiencies are identified; best practices discussed. Any State of FL contracts in the past 5 years?	4
Criterion 1 Subtotal	10
2. 4.2.5 Services - 4.2.5.1 Development & Delivery	
Collaborative Development – describes how the agency will collaborate with the Dept. on their specific hiring capacity and training needs. Discusses how the Dept.’s input on the CPI training program will be incorporated.	4
Development & Validation – discusses the development and validation of student and trainer materials/training aids; learning and performance objectives; as well as pilot or prototype classes/courses/modules.	4
Module Delivery - explains how each module will be integrated with previous and future modules for consistent delivery of the CPI training program throughout the NER.	4
Flexible Service Delivery – trainings are scheduled yet with adjustable final dates and locations. Classes occur in various locations within the NER to meet the Dept.’s hiring and training needs. Locations correspond to where majority of trainees are located. Includes discussion on the logistics involved with locating, securing, preparing and obtaining rental training spaces and computer connectivity.	4
Innovative Service Delivery – services are available and customizable to meet the Dept.’s actual needs. Optimal delivery will be services available in an “a la carte” manner for the upcoming month/quarter, and adjusting other levels of services accordingly.	4
Criterion 2 Subtotal	20
3. 4.2.5 Services - 4.2.5.2 Structure	
Structure – describes the CPI training program structure to include: Dept.’s Core Competencies (Phase I + Phase II), IV-E Eligible in-service trainings, Family Centered Practice theories, and FSN familiarization training.	4

Teaching Techniques – brief discussion on teaching techniques, testing methodologies, on-line distant learning opportunities (for any non-core curriculum), third party training events, one-on-one consultation, technical assistance. On-line distant learning is <u>not</u> for core curriculum topics, but may be used to facilitate and enhance learning.	4
Criterion 3 Subtotal	8
4. 4.2.6 Staffing & Qualifications	
Staffing Levels – explains how staffing levels will best meet the standards and requirements of the work of this ITN.	4
Leadership Qualifications – explains why leadership team is qualified to lead agency in meeting the needs of this ITN.	4
Direct Staff Qualifications – explains why trainers are qualified to delivery services in this ITN.	4
Recruit/Retain & Train/Supervise – agency’s strategies for recruitment and retention. Discusses agency’s approach with training and supervision.	4
Criterion 4 Subtotal	16
5. 4.2.7 Project Management	
Quality Assurance (QA) – agency’s QA approach and implementation of improvement programs. Describes participation and compliance with Dept.’s statewide requirements and processes for QA and quality improvement; including quality management planning, quality reviews, reporting, measurement, analysis, and performance improvement.	4
FSFN & Confidentiality – agency’s approach to advising CPI’s and trainees on timely and accurate FSFN data entry. Describes protecting client info and maintaining confidentiality (in a training environment) relative to paper and computer-based file systems.	4
Admin Support - agency’s approach to admin support such as: student tracking, course graduates, course failures, retesting procedures, recertification, system data entry, coordinating class space and computers, performance measure tracking + reporting, training materials, as well as graduation ceremonies, diplomas and certificates.	4
Criterion 5 Subtotal	12
6. 4.3.3 Financial Information	
Financial Stability - copies of the agency’s independent financial and compliance audits, or certified financial statement for past 3 FY. Financial statements, and auditor reports, management letters or corresponding re-issued audit components. * For new entities - financial reports from each of the founding collaborative partners.	4

Financial Management – agency’s current financial management and accounting systems described. Agency’s capability to generate financial reports on costs, claims, and billing. Identified areas to be enhanced prior to implementation, if any. Sample reports attached to demonstrate financial reporting capability. * For new entities - describe the founding collaborative partners' system and provide the same supporting documentation.	4
IV-E - briefly describes agency’s familiarity, and experience if any, with Title IV-E funding and eligibility determination as related to Child Welfare training programs.	3
Reduce Admin – agency’s approach to reduce administrative costs, without affecting the quality of the services.	3
Criterion 6 Subtotal	14
7. 4.3.4 Budget	
Budget – includes a detailed line item projected budget for each FY. The line item budget contains dollar amounts for each item, allocated percentages for each item, and total amounts for each category. Does not contain any lines “miscellaneous” or “other”.	4
Budget Narrative - provides a detailed explanation and description of each line item. Provides discussion and clarification for any and all cost categories and their respective formulas used to derive proposed costs. Does not contain any lines labeled as “miscellaneous” or “other”.	4
Criterion 7 Subtotal Points	8
Total	

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Rating Sheet for the Programmatic & Financial Reply

CPI Training Program – NER

Vendors Name: _____

Criteria: 1. 4.2.4 Executive Overview

Sub Criteria: * Agency Overview * Agency Mission * Service History

0	Significant or complete lack of understanding, an incomprehensible approach, a significant of complete lack of skill and experience and extensive non-responsiveness.
1	Little competency, minimal capability, an inadequate approach to the subject area, infeasible and/or ineffective solutions, somewhat unclear, incomplete and /or non-responsive, a lack of understanding of the requirements and a lack of demonstrated experience and skills.
2	Fundamental competency, adequate capability, a basic approach to the subject area, apparently feasible but somewhat unclear solutions, a weak description in some areas, partial responsiveness, a fair understanding of requirements, a lack of experience/skills in some areas.
3	Clear competency, consistent capability, a reasoned approach to the subject area, feasible solutions, a generally clear and complete description of areas, extensive but incomplete responsiveness and a sound understanding of the requirements.
4	Extensive competency, proven capabilities, an outstanding approach to the subject area, innovative, practical and effective solutions, a clear and complete understanding of all areas, full responsiveness, a clear and comprehensive understanding of requirements and plan for the unforeseen.

SUB CRITERIA	Possible Points	Points
Agency Overview – describes the agency, type of business, number of years in business, what uniquely qualifies vendor for work described in this ITN. Any potential or known conflicts of interest?	0-3	_____
Agency Mission – agency's mission, principles, values, vision and described how this supports the delivery of the work described in ITN.	0-3	_____
Service History – agency's history delivering training services/programs. Successes and deficiencies are identified; best practices discussed. Any State of FL contracts in the past 5 years?	0-4	_____
Criteria 1 Total Points (0-10) =		_____

Notes/Rationale:

Evaluator Initials: _____

Rating Sheet for the Programmatic & Financial Reply

CPI Training Program – NER

Vendors Name: _____

Criteria: 2. Services - 4.2.5.1 Development & Delivery

Sub Criteria:

*** Collaboration* Develop & Validate * Modules * Flexible Delivery * Innovative Delivery**

0	Significant or complete lack of understanding, an incomprehensible approach, a significant of complete lack of skill and experience and extensive non-responsiveness.
1	Little competency, minimal capability, an inadequate approach to the subject area, infeasible and/or ineffective solutions, somewhat unclear, incomplete and /or non-responsive, a lack of understanding of the requirements and a lack of demonstrated experience and skills.
2	Fundamental competency, adequate capability, a basic approach to the subject area, apparently feasible but somewhat unclear solutions, a weak description in some areas, partial responsiveness, a fair understanding of requirements, a lack of experience/skills in some areas.
3	Clear competency, consistent capability, a reasoned approach to the subject area, feasible solutions, a generally clear and complete description of areas, extensive but incomplete responsiveness and a sound understanding of the requirements.
4	Extensive competency, proven capabilities, an outstanding approach to the subject area, innovative, practical and effective solutions, a clear and complete understanding of all areas, full responsiveness, a clear and comprehensive understanding of requirements and plan for the unforeseen.

SUB CRITERIA	Possible Points	Points
Collaborative Development – describes collaborating with the NER on specific hiring and training needs. Discusses how NER input will be incorporated into program.	0-4	_____
Development & Validation – discusses development and validation of student & trainer materials/training aids; learning and performance objectives; also pilot or prototype classes/courses/modules.	0-4	_____
Module Delivery - explains how modules will be integrated with previous and future modules for consistent delivery of the CPI training program throughout the NER.	0-4	_____
Flexible Delivery – describes scheduled yet flexible dates and locations for services. Classes in various needed locations where trainees are located. Logistics discussed to secure, locate, & obtain rental training spaces and computer connectivity.	0-4	_____
Innovative Delivery – describes training services as available and customizable to meet the Dept.'s needs. Service levels may be adjusted for other service items in upcoming month/quarter to meet the needs.	0-4	_____
Criteria 2 Total Points (0-20) =		_____

Notes/Rationale:

Evaluator Initials: _____

Rating Sheet for the Programmatic & Financial Reply

CPI Training Program – NER

Vendors Name: _____

Criteria: 3. Services – 4.2.5.2 Structure

Sub Criteria:

***Structure *Teaching Techniques**

0	Significant or complete lack of understanding, an incomprehensible approach, a significant of complete lack of skill and experience and extensive non-responsiveness.
1	Little competency, minimal capability, an inadequate approach to the subject area, infeasible and/or ineffective solutions, somewhat unclear, incomplete and /or non-responsive, a lack of understanding of the requirements and a lack of demonstrated experience and skills.
2	Fundamental competency, adequate capability, a basic approach to the subject area, apparently feasible but somewhat unclear solutions, a weak description in some areas, partial responsiveness, a fair understanding of requirements, a lack of experience/skills in some areas.
3	Clear competency, consistent capability, a reasoned approach to the subject area, feasible solutions, a generally clear and complete description of areas, extensive but incomplete responsiveness and a sound understanding of the requirements.
4	Extensive competency, proven capabilities, an outstanding approach to the subject area, innovative, practical and effective solutions, a clear and complete understanding of all areas, full responsiveness, a clear and comprehensive understanding of requirements and plan for the unforeseen.

SUB CRITERIA	Possible Points	Points
Structure – describes the CPI training program structure to include: Dept.'s Core Competencies (Phase I + Phase II), IV-E Eligible in-service trainings, Family Centered Practice theories, and FSN familiarization training.	0-4	_____
Teaching Techniques – discussion on teaching techniques, testing methodologies, on-line distant learning opportunities (for any non-core curriculum), third party training events, one-on-one consultation, technical assistance. On-line distant learning may be used to facilitate and enhance learning.	0-4	_____
Criteria 3 Total Points (0-8) =		_____

Notes/Rationale:

Evaluator Initials: _____

Rating Sheet for the Programmatic & Financial Reply

CPI Training Program – NER

Vendors Name: _____

Criteria: 4. 4.2.6 Staffing & Qualifications

Sub Criteria:

***Staff Levels * Leadership Qualifications * Direct Staff Qualifications * Recruit/Retain & Train/Supervise**

0	Significant or complete lack of understanding, an incomprehensible approach, a significant of complete lack of skill and experience and extensive non-responsiveness.
1	Little competency, minimal capability, an inadequate approach to the subject area, infeasible and/or ineffective solutions, somewhat unclear, incomplete and /or non-responsive, a lack of understanding of the requirements and a lack of demonstrated experience and skills.
2	Fundamental competency, adequate capability, a basic approach to the subject area, apparently feasible but somewhat unclear solutions, a weak description in some areas, partial responsiveness, a fair understanding of requirements, a lack of experience/skills in some areas.
3	Clear competency, consistent capability, a reasoned approach to the subject area, feasible solutions, a generally clear and complete description of areas, extensive but incomplete responsiveness and a sound understanding of the requirements.
4	Extensive competency, proven capabilities, an outstanding approach to the subject area, innovative, practical and effective solutions, a clear and complete understanding of all areas, full responsiveness, a clear and comprehensive understanding of requirements and plan for the unforeseen.

SUB CRITERIA	Possible Points	Points
Staffing Levels – explains how staffing levels will best meet the standards and requirements of the work for a CPI training program.	0-4	_____
Leadership Qualifications – explains why leadership team is qualified to lead agency in meeting the needs for a CPI training program.	0-4	_____
Direct Staff Qualifications – explains why trainers are qualified to delivery services for a CPI training program.	0-4	_____
Recruit/Retain & Train/Supervise – agency's strategies for recruitment and retention. Discusses agency's approach with training and supervision.	0-4	_____
Criteria 4 Total Points (0-16) =		_____

Notes/Rationale:

Evaluator Initials: _____

Rating Sheet for the Programmatic & Financial Reply

CPI Training Program – NER

Vendors Name: _____

Criteria: 5. 4.2.7 Project Management

Sub Criteria: *Quality Assurance * FSN & Confidentiality * Admin Support

0	Significant or complete lack of understanding, an incomprehensible approach, a significant of complete lack of skill and experience and extensive non-responsiveness.
1	Little competency, minimal capability, an inadequate approach to the subject area, infeasible and/or ineffective solutions, somewhat unclear, incomplete and /or non-responsive, a lack of understanding of the requirements and a lack of demonstrated experience and skills.
2	Fundamental competency, adequate capability, a basic approach to the subject area, apparently feasible but somewhat unclear solutions, a weak description in some areas, partial responsiveness, a fair understanding of requirements, a lack of experience/skills in some areas.
3	Clear competency, consistent capability, a reasoned approach to the subject area, feasible solutions, a generally clear and complete description of areas, extensive but incomplete responsiveness and a sound understanding of the requirements.
4	Extensive competency, proven capabilities, an outstanding approach to the subject area, innovative, practical and effective solutions, a clear and complete understanding of all areas, full responsiveness, a clear and comprehensive understanding of requirements and plan for the unforeseen.

SUB CRITERIA	Possible Points	Points
Quality Assurance (QA) – agency's QA approach and implementation of improvement programs. Describes participation and compliance with Dept.'s statewide requirements and processes for QA and quality improvement; including quality management planning, quality reviews, reporting, measurement, analysis, and performance	0-4	_____
FSN & Confidentiality – described advising CPI's & trainees on timely and accurate FSN data entry. Describes protecting client info and maintaining confidentiality (in a training environment) relative to paper and computer-based file systems.	0-4	_____
Admin Support - agency's approach to admin support such as: student tracking, course graduates, course failures, retesting procedures, recertification, system data entry, coordinating class space and computers, performance measure tracking + reporting, training materials, as well as graduation ceremonies, diplomas and certificates.	0-4	_____
Criteria 5 Total Points (0-12) =		_____

Notes/Rationale:

Evaluator Initials: _____

Rating Sheet for the Programmatic & Financial Reply

CPI Training Program – NER

Vendors Name: _____

Criteria: 6. 4.3.3 Financial Information

Sub Criteria: * Financial Stability * Financial Management * IV-E * Reduce Admin

USE THE FOLLOWING INFO FOR SCORING FINANCIAL STABILITY ONLY:

Financial Stability - copies of the agency's independent financial and compliance audits, or certified financial statement for past three years such as: financial statements, auditor reports, management letters or re-issued audit components. For new entities, financial reports from each founding collaborative partner.

Assign a point value achieved in each section a, b, and c below.

The points from this section are used toward a final corresponding points total for Financial Stability.

a	<u>A Current Ratio</u> (Total Current Assets divided by Total Current Liabilities for the most recent year) 1.75 or greater = 4 points 1.25 or greater, but less than 1.75 = 2 points Greater than 1.00 but less than 1.25 = 1 point Less than or equal to 1.00 = 0 points	_____
b	<u>Months of Working Capital</u> (Total Current Assets Less Total Current Liabilities for the most recent year divided by one twelfth of the total expenses for the year as of the date of the financial statement.) 1.75 or greater = 4 points 1.25 or greater, but less than 1.75 = 2 points Greater than 0.80 but less than 1.25 = 1 point Less than or equal to 0.80 = 0 points	_____
c	<u>Independent Auditor's Report, Financial Statement Opinion</u> Financial Statements "present fairly..." = 4 points Financial Statements "present fairly...except (minor)" = 2 points Financial Statements "present fairly...except (major)" = 1 point Unaudited Financial Statements presented = 1 point Financial Statements "do not present fairly..." = 0 points	_____
ADD POINTS ABOVE = line d:		_____

*NEW ENTITY - when two or more agencies have come together to create a new entity, score each agency's financial and compliance audits and/or certified financial statements, or where vendors were not subject to audit requirements, their financial statements, independently of the other agencies. Once a score has been determined for each agency participating in the newly created entity, total their scores and divide by the number of participating agencies to arrive at an average score. The average score derived from the preceding paragraph is the final score that is to be recorded for Criterion 6.

ASSIGN THE FINAL SCORE BELOW BASED ON THE POINTS CALCULATED FROM ABOVE (a+b+c) = d:

The vendor obtained a score of 10-12 or greater on factors a, b, c listed above on line d.	4
The vendor obtained a score of 7-9 or greater on factors a, b, c listed above on line d.	3
The vendor obtained a score of 4-6 on factors a, b, c listed above on line d.	2
The vendor obtained a score of 2-3 on factors a, b, c listed above on line d.	1
The vendor obtained a score of 0-1 on factors a, b, c listed above on line d.	0
FINAL SCORE for Financial Stability (0-4 possible) = e	_____ line e

Criteria: 6. 4.3.3 Financial Information**Sub Criteria: * Financial Stability * Financial Management * IV-E * Reduce Admin****USE THE FOLLOWING SCALE FOR SCORING: FINANCIAL MANAGEMENT, IV-E, and REDUCE ADMIN:**

0	Significant or complete lack of understanding, an incomprehensible approach, a significant or complete lack of skill and experience and extensive non-responsiveness.
1	Little competency, minimal capability, an inadequate approach to the subject area, infeasible and/or ineffective solutions, somewhat unclear, incomplete and /or non-responsive, a lack of understanding of the requirements and a lack of demonstrated experience and skills.
2	Fundamental competency, adequate capability, a basic approach to the subject area, apparently feasible but somewhat unclear solutions, a weak description in some areas, partial responsiveness, a fair understanding of requirements, a lack of experience/skills in some areas.
3	Clear competency, consistent capability, a reasoned approach to the subject area, feasible solutions, a generally clear and complete description of areas, extensive but incomplete responsiveness and a sound understanding of the requirements.
4	Extensive competency, proven capabilities, an outstanding approach to the subject area, innovative, practical and effective solutions, a clear and complete understanding of all areas, full responsiveness, a clear and comprehensive understanding of requirements and plan for the unforeseen.

SUB CRITERIA	Possible Points	Points
Financial Stability – enter the calculated Final Score for Financial Stability from line e of the previous page.	0-4	_____
Financial Management – agency's current financial management & accounting systems described. Able to generate financial reports on costs, claims, and billing. Areas identified for enhancement, if any. Sample reports attached to demonstrate financial reporting capability. * New entities - described founding collaborative partners' system & provided same supporting documentation.	0-4	_____
IV-E - briefly describes familiarity with IV-E, and experience with Title IV-E funding and eligibility determination as related to Child Welfare training programs, if any.	0-3	_____
Reduce Admin – agency's approach to reduce administrative costs, without affecting the quality of the services.	0-3	_____
Criteria 6 Total Points (0-14) =		_____

Notes/Rationale:**Evaluator Initials:** _____

Rating Sheet for the Programmatic & Financial Reply

CPI Training Program – NER

Vendors Name: _____

Criteria: 7. 4.3.4 Budget

Sub Criteria: * Budget * Budget Narrative

0	Significant or complete lack of understanding, an incomprehensible approach, a significant of complete lack of skill and experience and extensive non-responsiveness.
1	Little competency, minimal capability, an inadequate approach to the subject area, infeasible and/or ineffective solutions, somewhat unclear, incomplete and /or non-responsive, a lack of understanding of the requirements and a lack of demonstrated experience and skills.
2	Fundamental competency, adequate capability, a basic approach to the subject area, apparently feasible but somewhat unclear solutions, a weak description in some areas, partial responsiveness, a fair understanding of requirements, a lack of experience/skills in some areas.
3	Clear competency, consistent capability, a reasoned approach to the subject area, feasible solutions, a generally clear and complete description of areas, extensive but incomplete responsiveness and a sound understanding of the requirements.
4	Extensive competency, proven capabilities, an outstanding approach to the subject area, innovative, practical and effective solutions, a clear and complete understanding of all areas, full responsiveness, a clear and comprehensive understanding of requirements and plan for the unforeseen.

SUB CRITERIA	Possible Points	Points
Budget – includes a projected budget for each FY. Contains amounts for each line item, and total amounts for each category. Does not contain any lines labeled "miscellaneous" or "other". Allocated percentages are listed for each line item. Does not contain any obvious math errors. Projected costs appear reasonable, necessary and allowable. The vendor's documentation fully demonstrates an understanding of the financial requirements needed to support a program. The proposed budget compliments the requirements of the proposed CPI Training Program.	0-4	_____
Budget Narrative - provides a detailed explanation and description of each line item. Provides discussion and clarification for costs, and their respective formulas used to derive proposed costs. Does not contain any lines labeled as "miscellaneous" or "other". The budget narrative clearly supports the budget figures. The narrative discusses the necessity for all positions included in the personnel category. The budget narrative supports the necessity for allowable costs.	0-4	_____
Criteria 7 Total Points (0-8) =		_____

Notes/Rationale:

Evaluator Initials: _____

Rating Sheet for the Oral Presentation

CPI Training Program – NER

Vendors Name: _____

Criteria 1. Executive Overview

Did the vendor present an overview of the agency? Did the vendor share the agency's mission statement, guiding principles, core values, and/or vision? Does the agency's mission statement and vision align with the Dept.? Did the vendor explain how the mission will support the development and delivery of a CPI Training Program in the Northeast Region?

Did the vendor present a service history of the agency? Did it include delivery of training services &/or programs?

0	The vendor either responded so poorly, or in such an unclear demonstration that the evaluation of the presentation was not possible. (Insufficient)
1	The vendor provided an overview of the agency, or agency's mission/vision, that is not compatible with that of the Department. The vendor did not provide adequate information, or very little was available, about a history of developing/delivering training programs. The vendor presented very minimal competency and minimal capability in this area. (Minimal)
2	The vendor provided an overview of the agency, and the agency's mission/vision that is nearly aligned with that of the Department. The vendor provided an overview of how the agency has a service history of developing/delivering training programs. The presentation demonstrates adequate competency and presents a basic approach in this area. (Adequate)
3	The vendor provided an overview of the agency, and the agency's mission/vision that are compatible with that of the Department. The vendor provided an overview of the agency's service history of developing/delivering either similar programs, or numerous and in-depth training programs. The presentation demonstrates clear competency, consistent capabilities and presents a reasoned approach in this area. (Competent)
4	The vendor provided an overview of the agency, and the agency's mission/vision that are compatible with that of the Department. The vendor provided an overview of the agency's extensive service history of developing and delivering similar, in-depth training programs. The presentation demonstrated extensive competency, superior capabilities and indicated that they have an outstanding record of developing and delivering training programs, AND, clearly demonstrates why their agency would be successful in service delivery representing the best value that would be in the best interest of the State. (Excellent)

Criteria 1. Points _____	Evaluator: _____
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Rating Sheet for the Oral Presentation

CPI Training Program – NER

Vendors Name: _____

Criteria 2. Services Approach

Did the vendor present an overview for the development of the training program, and include input from the Dept. on needs and hiring? Did the vendor share how input from the Dept. would be obtained? Did the vendor present a brief overview of the course structure for the program? Did the vendor discuss flexible dates/locations? Will training occur in various locations based on need, and based on where the majority of trainees/participants are? Was service delivery innovative with available and customizable trainings based on the need – adjusting other service levels as needed for the upcoming month/quarter?

0	The vendor either responded so poorly, or in such an unclear demonstration that the evaluation of the presentation was not possible. (Insufficient)
1	The vendor provided vague information on the development of the program, and did not include input from the Department, or did not share how input would be obtained, or both. The vendor did not provide adequate information about the delivery or about the structure of the CPI training program, or both. The vendor did not describe flexible delivery, and did not discuss innovative delivery based on the Dept.'s training needs. The vendor presented very minimal competency and minimal capability in this area. (Minimal)
2	The vendor presented information about developing a training program, which included input from the Department, and how input was obtained. The vendor provided information about delivery and structure of the CPI training program. The vendor described delivery in locations where needed, and where the majority of trainees are. The vendor discussed flexibility with dates and locations in service delivery. The presentation demonstrates adequate competency and presents a basic approach in this area. (Adequate)
3	The vendor provided an overview on the development of the proposed CPI training program, which included how input from the Department would be considered and incorporated into the training program. The vendor described specific examples of working with the Dept. to obtain input for the training program. The vendor presented an overview on the delivery and the structure of the CPI training program. The vendor described flexible delivery with trainings in various locations throughout the NER, where and when needed – depending on hiring dates and location of trainees. Service delivery was described as customizable with innovative solutions to provide trainings as needed rather than a standard schedule. The presentation demonstrates clear competency, consistent capabilities and presents a reasoned approach in this area. (Competent)
4	The vendor provided an overview on the development and structure of a comprehensive and enhanced CPI training program. Regular input from the Department would be incorporated into the training program, and specific examples of the format and working with the Dept. were discussed. Flexible service delivery would be provided, according to when and where new hires/trainees are located and could be easily adjusted. The vendor is capable of corresponding to impromptu training needs, and/or responding to an increase in the Dept.'s hiring capacity, as necessary. Service delivery would occur in various locations throughout the NER, where needed. Trainings would be available and customizable to match the actual NER needs. The vendor's ability to develop and deliver a flexible and innovative training program was evident in the presentation and demonstrated extensive competency, superior capabilities, flexibility and innovation AND, clearly demonstrates why their approach to service delivery represents the best value that would be in the best interest of the State. (Excellent)

Criteria 2. Points _____

Evaluator: _____

Rating Sheet for the Oral Presentation

CPI Training Program – NER

Vendors Name: _____

Criteria 3. Staffing & Qualifications

Did the vendor provide a brief overview of the staffing needs necessary for this project?
 Did the vendor discuss qualifications of leadership and direct training staff, to include minimum educational requirements and experience?
 To what extent did the vendor discuss their approach for the recruitment, retention, training and supervising for staff involved with this project?
 Did the vendor describe how the agency's staffing levels will best meet the performance standards required to fulfill the requirements of the CPI training program?

0	The vendor either responded so poorly, or in such an unclear demonstration that the evaluation of the presentation was not possible. (Insufficient)
1	The vendor may have provided some vague information on staffing. Qualifications were not presented for leadership, for direct staff, or both. The vendor did not provide adequate information about staffing and/or about staff qualifications. The vendor did not provide adequate information about recruitment and retention, or training and supervising, or both. The vendor presented very minimal competency and minimal capability in this area. (Minimal)
2	The vendor presented an overview of the staffing needs for the proposed training program. Qualifications were presented for leadership, and for direct staff to include minimum education and experience necessary. The vendor discussed the recruitment, retention, training and supervising approach for staff involved with this project. The presentation demonstrates adequate competency and presents a basic approach in this area. (Adequate)
3	The vendor presented a concise but, thorough overview of the staff necessary to deliver a training program throughout the NER. The vendor discussed the specific qualifications for staff members, both leadership and direct staff, including their education and experience which would support a successful training program. The vendor described a competent approach for recruitment, retention, training and supervision of staff involved with this project. The presentation demonstrates clear competency, consistent capabilities and presents a reasoned approach in this area. (Competent)
4	The vendor presented a concise and thorough overview of the staff necessary to deliver a training program throughout the NER. The vendor discussed highly qualified staff to develop, deliver and support a successful program. Leadership and direct staff were identified, or described, with relevant education and experience. The vendor discussed competent approaches for recruitment, retention, training and supervision of staff. The vendor described how the agency's staffing levels will best meet the performance standards required to fulfill the requirements of the CPI training program. The vendor's presentation demonstrated an outstanding record of working with highly qualified and capable staff, and indicated remarkable capabilities in this area, AND, clearly demonstrates the best value that would be in the best interest of the State. (Excellent)

Criteria 3. Points _____	Evaluator: _____
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Rating Sheet for the Oral Presentation

CPI Training Program – NER

Vendors Name: _____

Criteria 4. Project Management

Did the vendor describe how they will participate in and ensure compliance with the Department 's statewide requirements and processes for quality assurance and quality improvement; including quality management planning, quality reviews, reporting, measurement, analysis, and performance improvement?

Did the vendor provide a brief overview of the agency's approach to quality assurance and improvement, and share about implementation?

0	The vendor either responded so poorly, or in such an unclear demonstration that the evaluation of the presentation was not possible. (Insufficient)
1	The vendor provided some vague information on quality assurance. Compliance with the Dept.'s requirements or processes were not presented fully. The vendor did not provide adequate information, or very little was available, about the agency's approach to quality assurance and improvement. The vendor did not discuss implementation of any QA plans. The vendor presented very minimal competency and minimal capability in this area. (Minimal)
2	The vendor provided an overview of the agency's participation and compliance with the Department 's statewide requirements and processes. The vendor provided information on the agency's approach to quality assurance and improvement, and shared about implementation. The presentation demonstrates adequate competency and presents a basic approach in this area. (Adequate)
3	The vendor described the agency's participation with the Department 's statewide requirements and processes, and discussed measures to ensure compliance. The vendor provided an overview on the agency's approach to quality assurance and quality improvement. Implementation was described specific to the CPI training program. The presentation demonstrates clear competency, consistent capabilities and presents a reasoned approach in this area. (Competent)
4	The vendor described the agency's participation with the Department 's statewide requirements and processes for quality assurance and quality improvement; including quality management planning, quality reviews, reporting, measurement, analysis, and performance improvement. The vendor also discussed measures to ensure compliance. The vendor clearly described their approach and plans to implement a quality assurance and quality improvement program specific to a CPI training program. The vendor's experience with quality assurance was established and indicated that they have experience developing and implementing QA plans, AND, their response to this criterion clearly demonstrates why their approach to service delivery represents the best value and would be in the best interest of the State. (Excellent)

Criteria 4. Points _____	Evaluator: _____
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Rating Sheet for the Oral Presentation

CPI Training Program – NER

Vendors Name: _____

Criteria 5. Financial/Budget

Did the vendor provide an overview of the agency's financial stability? Did the vendor provide an overview of the agency's financial management? Did the vendor discuss the development of the budget for the project, to include how the budget corresponds to staffing, training room costs, travel?

Did the vendor discuss why, and how, they represent the best value to the state and provide information to support this assertion?

0	The vendor either responded so poorly, or in such an unclear demonstration that the evaluation of the presentation was not possible. (Insufficient)
1	The vendor provided an overview of the agency's financial position and financial management that was insufficient to support the development/delivery of a CPI training program. The vendor did not provide adequate information, or very little was available, about the expenses and budget necessary for the project. The vendor presented very minimal competency and minimal capability in this area. (Minimal)
2	The vendor provided an overview of the agency's financial position and financial management adequate to support the development/delivery of a CPI training program. The vendor provided an overview of how the agency developed a budget based on estimated expenditures necessary to deliver a program. The presentation demonstrates adequate competency and presents a basic approach in this area. (Adequate)
3	The vendor provided an overview of the agency's financial position and financial management that was sound and would support the development/delivery of a CPI training program. The vendor discussed the development of the budget for the project to include how the budget corresponds to staffing, training room costs, travel. The vendor discussed why, and how, they represent the best value to the state and provided information to support this assertion. The presentation demonstrates clear competency, consistent capabilities and presents a reasoned approach in this area. (Competent)
4	The vendor provided an overview of the agency's financial position and financial management that was sound and would support the development/delivery of a CPI training program. The vendor discussed the development of a lean budget for the project, and included how the budget corresponds to staffing, training room costs, travel. The vendor provided information as to why and how they represent the best value to the state and provided information to support this assertion. The presentation demonstrated extensive financial capabilities and indicated that they have an outstanding record of financial management, AND, their response to this criterion clearly demonstrates why their approach to service delivery represents the best value and would be in the best interest of the State. (Excellent)

Criteria 5. Points _____	Evaluator: _____
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RATING SUMMARY SHEET
CPI TRAINING PROGRAM IN THE NORTHEAST REGION

Vendor Name: _____

Evaluators shall assign scores to each of the replies received by the Department based on the following criteria:

A. Programmatic & Financial Reply:

Criteria		Criteria Points	Weighted Value	Criteria Score (with weighted value included)
1	Executive Overview		1x	
2	Development & Delivery		3x	
3	Structure		2x	
4	Staffing & Qualifications		2x	
5	Project Management		2x	
6	Financial Information		2x	
7	Budget		2x	
A. Final Weighted Score - Programmatic & Financial Reply:				

B. Oral Presentation:

Criteria		Criteria Points	Weighted Value	Criteria Score (with weighted value included)
1	Executive Overview		1x	
2	Services Approach		2x	
3	Staffing & Qualifications		1x	
4	Project Management		1x	
5	Financial/Budget		1x	
B. Final Weighted Score - Oral Presentation:				

Vendor's Grand Total Score (A. + B.) = _____