



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

Rick Scott
Governor

Rebecca Kapusta
Interim Secretary

**ADDENDUM #3 to the following Invitation to Negotiate (ITN):
Peer Services
Advertisement Number: ITN 080918HSET1**

Section 5.3.1, is hereby amended to read:

Scoring by Evaluators

The Department's Evaluators will independently evaluate each Reply in accordance with the following criteria:

Criteria	Maximum Possible Points
Programmatic Reply <ul style="list-style-type: none"> • Services Approach and Solution - The vendor's articulation of the manner in which they propose delivering the services outlined in the ITN and their ability to do so. • Organization Qualifications and Experience - The vendor's organizational structure, proposed subcontractors and experience and capability to deliver the proposed services outlined in the ITN. 	128
Financial Reply <ul style="list-style-type: none"> • The budget summary and narrative provided by the vendor will be evaluated to initially determine if costs are reasonable, allowable and within the funding limits outlined in this ITN. These criteria and the Financial Reply will be used in the Negotiation Phase to assist the Negotiation Team in their recommendation to the Secretary or designee in determining which vendor(s) presents the best value. • The financial stability documentation provided by the vendor will be evaluated to determine the financial stability of the vendor. 	16

Section 5.3.2, is hereby amended to read:

Total Score, Recommended Ranking and Competitive Range of Replies

The Procurement Manager will average the total programmatic point scores by each Evaluator to calculate the points awarded for each section. The Procurement Manager will use total points to rank Vendors from 1 to n.

In the event that multiple Vendors receive the same point score, the ranked positions needed to cover those Vendors are the same.

The minimum Programmatic score to be eligible for Shortlist recommendation is **96** points.

This ranking will serve as the recommended ranking of the Department's Evaluators.

Appendix IX: PROGRAMMATIC REPLY EVALUATION MANUAL, is hereby added.

Appendix X: FINANCIAL REPLY EVALUATION MANUAL, is hereby added.

FAILURE TO FILE A PROTEST WITHIN THE TIME PRESCRIBED IN S. 120.57(3), F.S., OR FAILURE TO POST THE BOND OR OTHER SECURITY REQUIRED BY LAW WITHIN THE TIME ALLOWED FOR FILING A BOND SHALL CONSTITUTE A WAIVER OF PROCEEDINGS UNDER CHAPTER 120, F.S.

1317 Winewood Boulevard, Tallahassee, Florida 32399-0700

Mission: Work in Partnership with Local Communities to Protect the Vulnerable, Promote Strong and Economically Self-Sufficient Families, and Advance Personal and Family Recovery and Resiliency

State of Florida
Department of Children and Families



ITN# - 080918HSET1
Peer Services

Programmatic Reply
Evaluation Manual

Evaluator Name: _____

Vendor Name: _____

Date of Reply Evaluation: _____

Evaluator Signature: _____

1 GENERAL INSTRUCTIONS

- 1.1 Each evaluator will evaluate the Programmatic Reply from all vendors that pass the mandatory criteria. Each evaluation criterion must be scored. If any evaluator score sheet is missing scores, it will be returned for completion. Scoring must reflect the evaluator's independent evaluation of the reply to each evaluation criterion.
- 1.2 Each evaluator will assign a score for each evaluation criterion based upon the evaluator's professional assessment of the reply, up to the maximum points allowed for each criterion, as detailed below. Some questions have a weighted value (maximum 8 points) and will be scored accordingly. Fractional values or point values not in the table below will not be accepted.

If, in your judgment, the reply demonstrates or describes ...	Points	
	Non-weighted	Weighted
... a clear and complete understanding of the requirements for the program component; an innovative, comprehensive approach; exceeds all specifications and requirements; and an exceptional ability to provide the service.	4	8
... a sound understanding of the requirements for the program component; a reasoned, comprehensive approach; meets all specifications and requirements; and a proven ability to provide the service.	3	6
... a basic understanding of the requirements for the program component; a feasible approach; meets all minimum specifications and requirements; and a basic ability to provide the service.	2	4
...minimal understanding of the requirements for the program component; an inadequate approach; does not meet all specifications and requirements; and a minimal ability to provide the service.	1	2
...no understanding of the requirements for the program component; an incomprehensible approach; does not address the program component; and no ability to provide the service.	0	0

- 1.3 When completing score sheets, evaluators should record references to the sections of the 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 the item accordingly.
- 1.4 Each evaluator has been provided a copy of the ITN, including its appendices, addenda, and vendor written inquiries and the written responses provided by the Department. Each evaluator will also be provided with a copy of each reply, which should be evaluated and scored according to the instructions provided herein.
- 1.5 Each member of the evaluation team shall independently score each reply. 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 Only the rating sheets provided may be used. No additional notes or marks should appear elsewhere in the evaluation manual.
- 1.8 Evaluators may request assistance in understanding evaluation criteria and replies only from the Procurement Manager.
- 1.9 Questions related to the solicitation and the evaluations of the reply should be directed only to:
Michele.staffieri@myflfamilies.com
- 1.10 After each evaluator has completed the scoring of each reply, the scores are then submitted to the Procurement Manager for compilation. The Procurement Manager will average the total point scores by each evaluator to calculate the points awarded for each section.
- 1.11 Following completion of the independent evaluations of the replies, 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 programmatic replies received by the Department based on their professional assessment of how effectively the proposed approach will achieve the desired outcomes regarding the following criteria:

- Vendor's articulation of their project approach and solution, and the ability of the approach and solution to meet the Department's needs and the requirements of this ITN
- The innovation of the approach and solution
- Experience and skills of proposed staff relative to the proposed approach and solution
- Vendor experience and qualifications for implementing similar solutions to the one specified in this ITN

3 REPLY POINT VALUES

The maximum score for the Programmatic Reply is 128 points.

The minimum acceptable points for the Programmatic Reply to be considered for the Short List is 96 points.

Criteria	Description	Total Possible Points	Total Points Assigned
1.	Training Tasks	32	
2.	System Development Tasks	32	
3.	Warm Line Tasks	24	
4.	Company Qualifications and Experience	40	
Total		128	

Criteria 1 – Training Tasks		Points Awarded
Tab 4 - ITN References: Section 3.2.2 and 4.2.5.1		
1.	<p>Training Coordination</p> <p><i>How well does the reply demonstrate the vendor's ability to coordinate training event logistics, including scheduling, site selection, and inclusion of local stakeholders in the planning process?</i></p> <p style="text-align: right;"><i>Non-weighted Maximum 4 points.</i></p>	
2.	<p>Training</p> <p><i>How well does the reply address the various types of training to be provided? Does the reply include a reasonable number of each type of training and a meaningful rationale for determining the proposed number of each type of training?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
3.	<p>Engagement of the Target Population</p> <p><i>How well does the reply demonstrate the provider's ability to engage the target population and stakeholders for participation in training events?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
4.	<p>Selection of Trainers and Presenters</p> <p><i>How well does the reply demonstrate a meaningful rationale for the selection of trainers and presenters, including qualifications for the various types of events?</i></p> <p style="text-align: right;"><i>Non-weighted Maximum 4 points.</i></p>	
5.	<p>Curriculum Development</p> <p><i>How well does the reply demonstrate the vendor's ability to provide curriculum development, including consultation with subject matter experts and timeline for completion of each curriculum?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
Total Points Assigned by Evaluator <i>(Maximum Possible Points <u>32</u>)</i>		

Criteria 2 – System Development Tasks		Points Awarded
Tab 4 - ITN References: Section 3.2.3 and 4.2.5.2		
1.	<p>Statewide Needs Assessment</p> <p><i>How well does the reply demonstrate the vendor's ability to develop and implement a Statewide Needs Assessment to identify local and regional needs?</i></p> <p style="text-align: right;"><i>Non-weighted Maximum 4 points.</i></p>	
2.	<p>Regional Workshop and Summit Coordination</p> <p><i>How well does the reply demonstrate the vendor's ability to coordinate regional workshops and annual summit logistics, including scheduling, site selection and inclusion of local stakeholders in the planning process?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
3.	<p>Engagement of the Target Population</p> <p><i>How well does the reply demonstrate the vendor's ability to engage the target population and stakeholders for participation in regional workshops and the annual summit?</i></p> <p style="text-align: right;"><i>Non-weighted Maximum 4 points.</i></p>	
4.	<p>Selection of Topics, Trainers and Presenters</p> <p><i>How well does the reply demonstrate a meaningful rationale for the selection of topics, trainers and presenters, including qualifications for the various types of events?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
5.	<p>Value Added Components</p> <p><i>How well does the reply demonstrate any value-added components designed to enhance the state's peer network system?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
<p>Total Points Assigned by Evaluator <i>(Maximum Possible <u>32</u> Points)</i></p>		

Criteria 3 – Warm Line Tasks		Points Awarded
Tab 4 - ITN References: Section 3.2.4 and 4.2.5.3		
1.	<p>Warm Line Operation</p> <p><i>How well does the reply demonstrate the vendor's ability to operate the Warm Line, including hours of operation and the process for answering calls"?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
2.	<p>Warm Line Staffing</p> <p><i>How well does the reply demonstrate the vendor's ability to recruit, hire and train Warm Line staff, including manual development, supervision and timeline to be fully staffed and operational?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
3.	<p>Warm Line Advertising and Promotion</p> <p><i>How well does the reply demonstrate the vendor's ability to advertise and promote the Warm Line, including a meaningful rationale for the proposed advertisement and promotion activities?</i></p> <p style="text-align: right;"><i>Non-weighted Maximum 4 points.</i></p>	
4.	<p>Warm Line Data</p> <p><i>How well does the reply demonstrate the vendor's ability to collect and analyze data for calls received, including how the vendor will use the analysis to improve services?</i></p> <p style="text-align: right;"><i>Non-weighted Maximum 4 points.</i></p>	
<p>Total Points Assigned by Evaluator <i>(Maximum Possible Points <u>24</u>)</i></p>		

Criteria 4 – Company Qualifications and Experience		Points Awarded
Tab 4 - ITN References: Section 4.2.6		
1.	<p>Vendor Mission and Values</p> <p><i>How well does the reply demonstrate that the services outlined in the ITN align with the organization's philosophy, mission and core values, including an understanding and approach to service delivery from a person-centered perspective?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
2.	<p>Peer-Operated Organization</p> <p><i>How well does the reply demonstrate the vendor's commitment as a Peer-Operated organization, including a significant role of peers within the operation and management of the organization?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
3.	<p>Vendor Experience</p> <p><i>How well does the reply demonstrate the vendor's experience providing services similar to those specified in the ITN, including work by individuals who will be assigned to work on this project, either as staff members or subcontractors?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
4.	<p>Board of Directors</p> <p><i>How well does the reply demonstrate the composition of the vendor's Board of Directors, including identification of the role of each director and those who are peers?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
5.	<p>Staffing</p> <p><i>How well does the reply demonstrate proposed staffing of key positions, including the name of the proposed candidate, their experience and qualifications, if known, the proposed level of effort (FTE) and the rationale for the proposed level of effort?</i></p> <p><i>If the organization has not identified a candidate for each position, how well does the reply demonstrate the Vendor's proposed process and timeline for the selection of qualified candidates?</i></p> <p style="text-align: right;"><i>Weighted Maximum 8 points.</i></p>	
<p>Total Points Assigned by Evaluator (Maximum Possible Points <u>40</u>)</p>		

State of Florida
Department of Children and Families



ITN# - 080918HSET1
Peer Services

Financial Reply
Evaluation Manual

Evaluator Name: _____

Vendor Name: _____

Date of Reply Evaluation: _____

Evaluator Signature: _____

1 GENERAL INSTRUCTIONS

- 1.1 Each evaluator will evaluate the Financial Reply 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 scores, it will be returned for completion. Scoring must reflect the evaluator's independent evaluation of the reply to each evaluation criterion.
- 1.2 Each evaluator will assign a score for each evaluation criterion based upon the evaluator's professional assessment of the reply, up to the maximum points allowed for each criterion. Fractional values or point values not in the table below will not be accepted.

If, in your judgment the reply demonstrates or describes ...	Points
... a clear and complete description of each proposed project cost; narrative describes the nature of the line item costs and provides <u>sufficient detail</u> to support the calculation of proposed costs; demonstrates that <u>all</u> line items are reasonable, allowable and necessary for the provision of services for <u>each</u> state fiscal year.	4
... a sound understanding of the proposed project costs; narrative describes the nature of the line item costs and provides <u>sufficient detail</u> to support the calculation of proposed costs; demonstrates that <u>all</u> line items are reasonable, allowable and necessary for the provision of services but does <u>not</u> include costs for each state fiscal year.	3
... a basic understanding of the proposed project costs; narrative <u>does not</u> describe the nature of the line item costs but <u>does</u> provide details to support the calculation of proposed costs; demonstrates that line items <u>may</u> be reasonable, allowable and necessary for the provision of services.	2
... minimal understanding of the proposed project costs; narrative describes the nature of line item costs but <u>does not</u> provide details to support the calculation of costs; <u>does not</u> clearly demonstrate that all line items are reasonable, allowable, and necessary for the provision of services.	1
... no understanding of the proposed project costs; narrative does <u>not</u> clearly justify proposed costs; <u>insufficient detail</u> to determine if proposed costs are reasonable, allowable, or necessary for the provision of services.	0

- 1.3 When completing score sheets, evaluators should record references to the sections of the 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 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.
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E-Mail Address: Michele.staffieri@myflfamilies.com
- 1.10 After each evaluator has completed the scoring of each reply, the scores are then submitted to the Procurement Manager for compilation. The Procurement Manager will average the total point scores by each evaluator to calculate the points awarded for each section.
- 1.11 Following completion of the independent evaluations of the replies, 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 financial replies received by the Department based on their professional assessment of how effectively the proposed approach will achieve the desired outcomes regarding the following criteria:

- Vendor's articulation of their proposed project costs
- Vendor's financial stability documentation

3 REPLY POINT VALUES

The maximum score for the Financial Reply is 28 points.

Criteria	Description	Total Possible	Total Points Assigned
1.	Budget Summary and Narrative	12	
2.	Financial Stability	4	
Total		16	

Criteria 1 – Budget Summary and Narrative		Points Awarded
Tab 2 - ITN References: Section 3.3 and 4.3.3		
1.	<p>Budget Summary</p> <p><i>How well does the budget summary demonstrate the nature of the proposed costs associated with the provision of services for each state fiscal year within the funding limited specified in the ITN?</i></p> <p style="text-align: right;"><i>Maximum 4 points.</i></p>	
2.	<p>Budget Narrative</p> <p><i>How well does the budget narrative demonstrate the calculation and basis for each proposed cost? The proposal should demonstrate the methodology for the calculation of costs, including the basis of the cost (estimation or historical average), the number of units or the number of months on which the calculations are based.</i></p> <p style="text-align: right;"><i>Maximum 4 points.</i></p>	
3.	<p>Reasonable, Allowable and Necessary</p> <p><i>How well does the reply demonstrate that proposed costs are reasonable, allowable and necessary for the provision of services described in the programmatic reply?</i></p> <p style="text-align: right;"><i>Maximum 4 points.</i></p>	
<p>Total Points Assigned by Evaluator <i>(Maximum Possible Points <u>12</u>)</i></p>		

Criteria 2 - Financial Stability	
Tab 3 - ITN Reference: Sections 4.3.4	
Copies of Vendors' independent financial and compliance audit reports and/or certified financial statements for the three most recent fiscal years must be submitted. The copies should include all applicable financial statements, auditor's reports, management letters, and any corresponding re-issued audit components. If the Vendor does not have audit reports for the three most recent years, reviewed or compiled financial statements with the applicable Certified Public Accountant's report should be submitted. <u>A newly created entity should submit the requested financial reports from each of the founding collaborative partners.</u>	
Considerations: Assign the point value achieved in each section below. The total score for sections a-c shall be used on the following section to assign the corresponding points.	Points Assigned
<p><u>A Current Ratio</u> (Total Current Assets divided by Total Current Liabilities for the most recent year)</p> <p>1.75 or greater 4 points</p> <p>1) 1.25 or greater, but less than 1.75 2 points</p> <p>Greater than 1.00 but less than 1.25 1 point</p> <p>Less than or equal to 1.00 0 points</p>	
<p><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.)</p> <p>2) 1.75 or greater 4 points</p> <p>1.25 or greater, but less than 1.75 2 points</p> <p>Greater than 0.80 but less than 1.25 1 point</p> <p>Less than or equal to 0.80 0 points</p>	
<p><u>Independent Auditor's Report, Financial Statement Opinion</u> (for the most recent year)</p> <p>Financial Statements "present fairly..." 4 points</p> <p>3) Financial Statements "present fairly...except (minor)" 2 points</p> <p>Financial Statements "present fairly...except (major)" 1 point</p> <p>Unaudited Financial Statements presented 1 point</p> <p>Financial Statements "do not present fairly..." 0 points</p>	
ADDED SCORES:	

Assign the scores below based on the total derived from the previous section.	
The Vendor obtained a score of 10-12 on factors listed on the previous section.	4 points
The Vendor obtained a score of 7-9 on factors listed on the previous section.	3 points
The Vendor obtained a score of 4-6 on factors listed on the previous section.	2 points
The Vendor obtained a score of 2-3 on factors listed on the previous section.	1 point
The Vendor obtained a score of 0-1 on factors listed on the previous section.	0 points
Total Points Assigned by Evaluator (Maximum Possible Points <u>4</u>)	