

State of Florida
Department of Children and Families



ITN# - 030618KSET1
Consolidated Services for Refugees and Entrants in
Duval County

Evaluation Manual

Evaluator Name: _____

Vendor Name: _____

Date of Reply Evaluation: _____

Evaluator Signature: _____

1 GENERAL INSTRUCTIONS

- 1.1 Each evaluator will evaluate the programmatic 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 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 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 scores:

| IF, in your judgment the reply demonstrates and/or describes... | Category | ...assign points within ... |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|---------------------------------------------|
| ...extensive competency, proven capabilities, an outstanding approach to the subject area, innovative, practical and effective solutions, a clear and complete understanding of inter-relationships, full responsiveness, a clear and comprehensive understanding of the requirements and planning for the unforeseen. | Superior | 81-100% of the maximum points for the area. |
| ...clear competency, consistent capability, a reasoned approach to the subject area, feasible solutions, a generally clear and complete description of inter-relationships, extensive but incomplete responsiveness and a sound understanding of the requirements. | Good | 61-80% of the maximum points for the area. |
| ...fundamental competency, adequate capability, a basic approach to the subject area, apparently feasible but somewhat unclear solutions, a weak description of inter-relationships in some areas, partial responsiveness, a fair understanding of the requirements and a lack of staff experience and skills in some areas. | Adequate | 41-60% of the maximum points for the area. |
| ...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. | Poor | 21-40 %of the maximum points for the area. |
| ...a significant or complete lack of understanding, an incomprehensible approach, a significant of complete lack of skill and experience and extensive non-responsiveness. | Insufficient | 0-20% of the maximum points for the area. |

- 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 refer to 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.
- 1.10 Questions related to the solicitation and the evaluations of the reply should be directed only to:
Jenifer L. Fonseca, M.S.W., Procurement Manager
Florida Department of Children and Families, Refugee Services Program
1317 Winewood Blvd., Building 6, Suite 200
Tallahassee, FL 32399-0700
E-Mail Address: Jenifer.Fonseca@myflfamilies.com
- 1.11 After each evaluator has completed the scoring of each programmatic reply, the scores 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, the Procurement Manager will hold a meeting to validate evaluator scoring. The purpose of the meeting is to ensure that each individual's evaluation scores were captured correctly when preparing the total programmatic scores.

2 QUALITATIVE CRITERIA

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

- The Vendor's articulation of its approach to providing the required services and the ability of the approach to meet the requirements of this ITN and provide additional value.
- The Vendor's company structure, subcontractors, and experience and capability to deliver its proposed services including the Vendor's track record for providing services similar to the ones specified in this ITN.
- The skills and experience of the Vendor's leadership team, staff, and resources the Vendor will use in implementing its services.
- *Financial Reply*. The Vendor's financial management approach, proposed budget and related financial information. (Note: *This criterion will be evaluated by the Procurement Manager or the Budget Liaison. The Programmatic Evaluator will not evaluate or score the Financial Reply.*)

3 PROGRAMMATIC REPLY POINT VALUES AND FINANCIAL REPLY POINTS VALUES

The maximum score for the Programmatic Reply is 800 points.

The maximum score for the Financial Reply is 200 points

| Programmatic Criteria | Maximum Points | Percent of Total (1000 Points) |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|--------------------------------|
| 1. The Vendor’s articulation of its approach to providing the required services and the ability of the approach to meet the requirements of this ITN and provide additional value. | | |
| Approach to Service Delivery | 250 | 25% |
| Section 1 Subtotal | 250 | 25% |
| 2. The Vendor’s company structure, subcontractors, and experience and capability to deliver its proposed services including the Vendor track record providing services similar to the ones specified in this ITN | | |
| Experience and track record | 150 | 15% |
| Capability to Deliver Services (ability to achieve service unit goals, exceed performance measures, accommodate client needs, etc.) | 150 | 15% |
| Section 2 Subtotal | 300 | 30% |
| 3. The skills and experience of the Vendor’s leadership team, staff, and resources the Vendor will use in implementing its services. | | |
| Staff and Leadership Team | 100 | 10% |
| Organizational Structure (stability, support, oversight, etc.) | 50 | 5% |
| Resources | 100 | 10% |
| Section 3 Subtotal | 250 | 25% |
| Financial Reply Criteria | Maximum Points | Percent of Total |

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Duval County

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| 4. Financial Reply: The Vendor's financial management approach, proposed budget and related financial information. (Note: This criterion will be evaluated by the Procurement Manager or the Budget Liaison. The Programmatic Evaluator shall <u>not</u> evaluate or score the Financial | | |
| Financial Stability / Financial Management | 30 | 3% |
| Budget | 140 | 14% |
| Cost Comparison | 30 | 3% |
| Section 4 Subtotal | 200 | 20% |
| Total | 1000 | 100% |

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Evaluation Criteria 1 – Sub Criteria 1

Criteria:

The Vendor’s articulation of its approach to providing the required services and the ability of the approach to meet the requirements of this ITN and provide additional value.

Sub criteria:

Approach to Service Delivery

ITN Programmatic Reply Instructions:

The Vendor shall describe its approach to performing the tasks described in Sections 3.2.9 and 3.2.23 – 3.2.25 and how it will meet all of the Department’s detailed requirements. Specifically, the Vendor must clearly articulate superior methods it will employ to develop, implement, and manage a collaborative, consolidated service delivery system that focuses on managing services through the chosen service delivery method all of the services outlined in this ITN. The Vendor must describe an exceptional, detailed plan for how subcontracted Vendors will be capable of meeting the Department’s detailed requirements. The Vendor must include a well-articulated outline on how subcontracts will be held accountable if performance standards are not met.

ITN Related Text:

ITN Sections 4.2.5

Guidance:

- The Vendor presents a detailed Consolidated Services Plan outlining the Vendors strategy for developing, implementing, and operating a consolidated service delivery system in the service area that includes all requirements listed in the solicitation document. The Plan must include the decision- making process utilized by the Vendor. The selected lead agency model must be clearly delineated through visualization tools, including easy-to-read flow charts.
- The Consolidated Services Plan specifically names those programs and agencies that have agreed to provide services to refugees through the program.
- The Vendor clearly articulates a superior proposed service delivery model and detailed plan for providing services to target populations. The Vendor demonstrates how these will be provided in a reasonable, cost-effective, and efficient manner through subcontracts.
- The Vendor includes all signed subcontracts and/or memoranda of agreement supporting the proposed service delivery system.
- The Vendor clearly delineates entry points into the program for all client sub-groups (refugee and non-refugee).
- The Vendor clearly outlines how services available through mainstream community resources will form part of the network of services available for clients in the service area.
- The Vendor describes a reasonable and workable plan for outreach.
- The Vendor clearly articulates a superior implementation of its Quality Management Plan. The Vendor also clearly outlines a high-caliber plan for monitoring the performance of subcontracted organizations.
- The Vendor describes a client case file within the context of the chosen lead agency delivery system including security and safeguarding of client files.

Criteria:

The Vendor's articulation of its approach to providing the required services and the ability of the approach to meet the requirements of this ITN and provide additional value.

Sub criteria:

Approach to Service Delivery

- The Vendor articulates a well thought-out plan for how supportive services will be provided within the chosen lead agency delivery system. The Vendor describes existing and planned links with local organizations that will benefit refugees. The Vendor explains how documentation and tracking of referrals will happen within the chosen lead agency delivery system.
- The Vendor clearly describes and justifies any additional tasks that it proposes (i.e. translation services, transportation assistance, emergency client assistance, etc.) within the chosen lead agency delivery system.
- The Vendor clearly articulates an exceptional Refugee Services Transition Plan, including plans for development and implementation.

Criteria:
The Vendor's articulation of its approach to providing the required services and the ability of the approach to meet the requirements of this ITN and provide additional value.

Sub criteria:
Approach to Service Delivery

Notes/Rationale:

DRAFT

Score (0-250): _____

Evaluator Initials: _____

| Topic | Max Points | Superior (81-100%) | Good (61-80%) | Adequate (41-60%) | Poor (21-40%) | Insufficient (0-20%) |
|--------------------------------|------------|--------------------|---------------|-------------------|---------------|----------------------|
| • Approach to Service Delivery | 250 | | | | | |

Evaluation Criteria 2 – Sub Criteria 1

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| <p>Criteria: The Vendor’s company structure, subcontractors, and experience and capability to deliver its proposed services including the Vendor track record providing services similar to the ones specified in this ITN</p> |
| <p>Sub criteria: Experience and Track Record</p> |
| <p><i>ITN Programmatic Reply Instructions:</i></p> <p>The Vendor shall describe its approach to performing the tasks described in Sections 3.2.9 and 3.2.23 – 3.2.25 and how it will meet all of the Department’s detailed requirements. Specifically, the Vendor must clearly articulate superior methods it will employ to develop, implement, and manage a collaborative, consolidated service delivery system that focuses on managing services through the chosen service delivery method all of the services outlined in this ITN. The Vendor must describe an exceptional, detailed plan for how subcontracted Vendors will be capable of meeting the Department’s detailed requirements. The Vendor must include a well-articulated outline on how subcontracts will be held accountable if performance standards are not met.</p> <p>AND</p> <p>Company Qualifications and Experience (Evaluators, please refer to Section 4.2.6 for more details on these instructions)</p> |
| <p><i>ITN Related Text:</i> ITN Sections 4.2.5, 4.2.5(U), 4.2.5(V), 4.2.6</p> |
| <p><i>Guidance:</i></p> <ul style="list-style-type: none"> • The Vendor has presented evidence showing that it consistently meets or exceeds performance expectations providing similar services to vulnerable populations. The evidence includes all relevant services the Vendor is currently providing, where those services are being provided, which populations are being served, and both the expected and attained performance measures. • The Vendor presented evidence of substantial, proven experience providing employment services, integration assistance services, immigration-related legal services, youth services, adult education services, and/or child care services to refugees and entrants in the service area. • The Vendor has proven leadership and experience managing services through subcontracts. • The Vendor has included previous experience achieving positive outcomes for its vulnerable clients. The Vendor included evidence of the positive outcomes. • The Vendor has significant experience working with multicultural, multilingual vulnerable populations. • The Vendor provides evidence of proactive and timely management of any audits, reviews, and/or monitoring results. • The Vendor’s monitoring results and performance reviews have been primarily positive in nature. |

Criteria:
The Vendor's company structure, subcontractors, and experience and capability to deliver its proposed services including the Vendor track record providing services similar to the ones specified in this ITN

Sub criteria:
Experience and Track Record

Notes/Rationale:

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Score (0-150): _____

Evaluator Initials: _____

| Topic | Max Points | Superior (81-100%) | Good (61-80%) | Adequate (41-60%) | Poor (21-40%) | Insufficient (0-20%) |
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| • Experience and Track Record | 150 | | | | | |

Evaluation Criteria 2 – Sub Criteria 2

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| <p>Criteria: The Vendor’s company structure, subcontractors, and experience and capability to deliver its proposed services including the Vendor track record providing services similar to the ones specified in this ITN</p> |
| <p>Sub criteria: Capability to Deliver Services (ability to achieve service unit goals, exceed performance measures, accommodate client needs, etc.)</p> |
| <p><i>ITN Programmatic Reply Instructions:</i></p> <p>The Vendor shall describe its approach to performing the tasks described in Sections 3.2.9 and 3.2.23 – 3.2.25 and how it will meet all of the Department’s detailed requirements. Specifically, the Vendor must clearly articulate the superior methods it will employ to develop, implement, and manage a collaborative, consolidated service delivery system that focuses on managing services through the chosen service delivery method all of the services outlined in this ITN. The Vendor must describe an exceptional, detailed plan for how subcontracted Vendors will be capable of meeting the Department’s detailed requirements. The Vendor must include a well-articulated outline on how subcontracts will be held accountable if performance standards are not met.</p> <p>AND</p> <p>Company Qualifications and Experience (Evaluators, please refer to Section 4.2.6 for more details on these instructions)</p> |
| <p><i>ITN Related Text:</i> ITN Sections 4.2.5, 4.2.5(U), 4.2.5(V), 4.2.5(W) 4.2.6</p> |
| <p><i>Guidance:</i></p> <ul style="list-style-type: none"> • The Vendor has proposed service unit numbers that are realistic and reasonable. • The Vendor provided both a clear narrative and methodology describing how the service units were determined and how they are achievable in the context of the chosen delivery system. • The Vendor has proposed performance measure percentages that are reasonable and achievable based on historical performance by the Vendor. • The reply describes the Vendor’s proven process for tracking, meeting, and exceeding all of the sample deliverables and performance measures within the chosen service delivery system. The Vendor clearly articulates a proven and superior method to analyze data to ensure credible documentation of service delivery. • The Vendor has explained in detail its “electronic management information capability” within the context of the chosen delivery system and clearly provided substantial information on how it will assist in completing all reporting requirements. |

Criteria:
The Vendor's company structure, subcontractors, and experience and capability to deliver its proposed services including the Vendor track record providing services similar to the ones specified in this ITN

Sub criteria:
Capability to Deliver Services (ability to achieve service unit goals, exceed performance measures, accommodate client needs, etc.)

Notes/Rationale:

DRAFT

Score (0-150): _____ *Evaluator Initials:* _____

| Topic | Max Points | Superior (81-100%) | Good (61-80%) | Adequate (41-60%) | Poor (21-40%) | Insufficient (0-20%) |
|----------------------------------|------------|--------------------|---------------|-------------------|---------------|----------------------|
| • Capability to Deliver Services | 150 | | | | | |

Evaluation Criteria 3 – Sub Criteria 1

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| <p>Criteria: The Vendor’s organizational structure as well as skills and experience of the Vendor’s leadership team, staff, and resources the Vendor will use in implementing its services</p> |
| <p>Sub criteria: Staff and Leadership Team</p> |
| <p><i>ITN Programmatic Reply Instructions:</i></p> <p>Core Team Qualifications (Evaluators, please refer to Section 4.2.7 for more details on these instructions)</p> |
| <p><i>ITN Related Text:</i> ITN Section 4.2.7</p> |
| <p><i>Guidance:</i></p> <ul style="list-style-type: none"> • The Vendor has included an easily understandable organizational chart including all proposed staff, supervisors, managers, and leadership positions. • The number and type of staff proposed for this project are adequate to provide appropriate services to the number of clients the Vendor intends to serve. • The Vendor describes staff members that will require special qualifications (i.e. ELI instructors/teachers, staff members assisting with citizenship and immigration related legal services, etc.). The Vendor has proposed a sufficient number of these staff members to adequately provide services. • The Vendor describes a superior approach to the recruitment, training, supervision, and retention of qualified personnel. • The Vendor’s proposed onsite staff has relevant linguistic capability and cultural competency in relation to the population to be served. • The Vendor clearly and completely describes the activities that each staff member will be performing on a regular basis. • The Vendor describes a management team that is qualified (strong, organized, capable, responsible, goal-driven) to lead their organization in meeting the needs of the ITN. • The Vendor has demonstrated a reasonably low employee turnover rate over the last three (3) years. |

| Criteria: The Vendor's organizational structure as well as skills and experience of the Vendor's leadership team, staff, and resources the Vendor will use in implementing its services | | | | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|--------------------|----------------------------------|-------------------|---------------|----------------------|
| Sub criteria: Staff and Leadership Team | | | | | | |
| <i>Notes/Rationale:</i> <div style="text-align: center; opacity: 0.3; font-size: 4em; transform: rotate(-30deg); pointer-events: none;">DRAFT</div> | | | | | | |
| <i>Score (0-100):</i> _____ | | | <i>Evaluator Initials:</i> _____ | | | |
| Topic | Max Points | Superior (81-100%) | Good (61-80%) | Adequate (41-60%) | Poor (21-40%) | Insufficient (0-20%) |
| <ul style="list-style-type: none"> • Staff and Leadership Team | 100 | | | | | |

Evaluation Criteria 3 – Sub Criteria 2

Criteria:

The Vendor’s subcontractors, and experience and capability to deliver its proposed services including the Vendor track record providing services similar to the ones specified in this ITN

Sub criteria:

Organizational Structure (stability, support, oversight, etc.)

ITN Programmatic Reply Instructions:

The Vendor shall provide a brief executive overview demonstrating an understanding of the ITN purpose stated in Section 1.2, and the needs specified in this ITN. The Vendor shall also demonstrate a strong understanding of the overall goals of the program. The Executive Overview should include a brief description of the Vendor’s organization, leadership credentials, approach for Scope of Work services, management of Performance Specifications and completing Deliverables as defined in this ITN.

AND

Company Qualifications and Experience (Evaluators, please refer to Section 4.2.6 for more details on these instructions)

AND

Core Team Qualifications (Evaluators, please refer to Section 4.2.7 for more details on these instructions)

ITN Related Text:

ITN Sections 4.2.4, 4.2.5, 4.2.5 (A), 4.2.5 (W) 4.2.6, 4.2.7

Guidance:

- The Vendor thoroughly & adequately describes its Consolidated Refugee Services Transition Plan and how it will be developed, implemented, and which current refugee service providers will form part of the proposed service delivery network.
- The Vendor’s organizational structure indicates stable operational and administrative support for this project. The administrative model appears to be both efficient and effective.
- The Vendor has an adequate administrative organizational structure to fulfill all of the responsibilities under this contract, including program oversight and management of information systems.
- The Vendor demonstrates the ability and flexibility to reduce and expand the scale of the program in the event of a reduction or increase in eligible populations and/or available funding.
- The Vendor identifies all subcontracts, including its plan and approach to identify, vet, recruit, train, retain subcontractors who will provide proposed services.

Criteria:

The Vendor's subcontractors, and experience and capability to deliver its proposed services including the Vendor track record providing services similar to the ones specified in this ITN

Sub criteria:

Organizational Structure (stability, support, oversight, etc.)

- The Vendor adequately describes how it will ensure that it operates in accordance with 2 CFR, Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements of Federal Awards (Uniform Grant Guidelines). As evidence of compliance, the Vendor has submitted (1) Written Procurement Policies and Procedures; (2) Written Monitoring Policies and Procedures; (3) The Vendor's DUNS number; and (4) Suspension and Disbarment Information from the Federal Government's FAPIIS website.

Notes/Rationale:

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| Criteria: The Vendor's subcontractors, and experience and capability to deliver its proposed services including the Vendor track record providing services similar to the ones specified in this ITN | | | | | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|--------------------|----------------------------------|-------------------|---------------|----------------------|
| Sub criteria: Organizational Structure (stability, support, oversight, etc.) | | | | | | |
| <i>Score (0-50):</i> _____ | | | <i>Evaluator Initials:</i> _____ | | | |
| Topic | Max Points | Superior (81-100%) | Good (61-80%) | Adequate (41-60%) | Poor (21-40%) | Insufficient (0-20%) |
| • Organizational Structure | 50 | | | | | |

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Evaluation Criteria 3 – Sub Criteria 3

Criteria:
The skills and experience of the Vendor’s leadership team, staff, and resources the Vendor will use in implementing its services

Sub criteria:
Resources

ITN Programmatic Reply Instructions:

The Vendor shall provide a brief executive overview demonstrating an understanding of the ITN purpose stated in Section 1.2, and the needs specified in this ITN. The Vendor shall also demonstrate a strong understanding of the overall goals of the program. The Executive Overview should include a brief description of the Vendor’s organization, leadership credentials, approach for Scope of Work services, management of Performance Specifications and completing Deliverables as defined in this ITN.

AND

The Vendor shall describe its approach to performing the tasks described in Sections 3.2.9 and 3.2.23 – 3.2.25 and how it will meet all of the Department’s detailed requirements. Specifically, the Vendor must explain in detail the methods it will use to develop, implement, and manage a collaborative, consolidated service delivery system that focuses on managing services through the chosen service delivery method all of the services outlined in this ITN. The Vendor must describe in detail how subcontracted Vendors will be capable of meeting the Department’s detailed requirements. The Vendor must outline how subcontractors will be held accountable if performance standards are not met.

AND

Company Qualifications and Experience (Evaluators, please refer to Section 4.2.6 for more details on these instructions)

ITN Related Text:

ITN Sections 4.2.4, 4.2.5, 4.2.5 (B), 4.2.6

Guidance:

- Does the Vendor currently provide certain refugee or immigrant services in the service area?
- Does the Vendor currently provide refugee resettlement services, services through Matching Grant?
- Does the Vendor provide other types of similar relevant services in the area? Will these services benefit refugee clients?
- The Vendor’s service site(s) are convenient and easily accessible to clients.
- The Vendor proposes service times which are convenient for clients.
- The Vendor’s proposed service site locations sufficiently meet the needs of the target population.
- The Vendor describes in detail how it will develop, implement, and manage a collaborative, consolidated service delivery system that focuses on managing services through the chosen delivery system and work collaboratively with other organizations that serve similar populations. The Vendor describes its openness and ability to cooperate with these organizations. The Vendor presents letters of support and/or MOUs from these partner organizations.

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| <p>Criteria: The skills and experience of the Vendor's leadership team, staff, and resources the Vendor will use in implementing its services</p> | | | | | | |
| <p>Sub criteria: Resources</p> | | | | | | |
| <p><i>Notes/Rationale:</i></p> <div style="text-align: center; opacity: 0.3; font-size: 48px; transform: rotate(-30deg); pointer-events: none;">DRAFT</div> | | | | | | |
| <p><i>Score (0-100):</i> _____</p> | | | | <p><i>Evaluator Initials:</i> _____</p> | | |
| Topic | Max Points | Superior (81-100%) | Good (61-80%) | Adequate (41-60%) | Poor (21-40%) | Insufficient (0-20%) |
| • Resources | 100 | | | | | |

Financial Reply Criteria – Sub Criteria 1

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| <p>Criteria: The Vendor’s financial management approach, proposed budget and related financial information. (Note: This criterion will be evaluated by the Procurement Manager or the Budget Liaison. The Programmatic Evaluator shall not evaluate or score the Financial Reply)</p> |
| <p>Sub criteria: Financial Stability / Financial Management</p> |
| <p><i>ITN Financial Reply Instructions:</i> The Vendor must describe its current financial management and accounting systems and capability by submitting copies of their independent financial and compliance audit report and/or certified financial statements for the two (2) most recent fiscal years. These documents must be contained in a 3-ring binder, separate from the rest of the reply. The copies shall 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 two most recent years, reviewed or compiled financial statements with the applicable Certified Public Accountant’s report shall be submitted. A newly created entity shall submit the requested financial reports from each of the founding collaborative partners.</p> |
| <p><i>ITN Related Text:</i> ITN Sections 4.3.2, 4.3.2.1</p> |
| <p><i>Guidance:</i></p> <p style="text-align: center;"><u>FINANCIAL STABILITY</u></p> <p>Copies of Vendors’ independent financial and compliance audit reports and/or certified financial statements for the two most recent fiscal years. 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 two 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> Procedure for determining a score for financial stability where 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 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.</p> |

Criteria:
The Vendor's financial management approach, proposed budget and related financial information. (Note: This criterion will be evaluated by the Procurement Manager or the Budget Liaison. The Programmatic Evaluator shall not evaluate or score the Financial Reply)

Sub criteria:
Financial Stability / Financial Management

Notes/Rationale:

Considerations: Please assign the point value achieved in each section below. The total score for sections a-f shall be used on the following Rating Sheet Summary Page for Financial Stability to assign the corresponding points.

| | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|--|
| <p><u>A Current Ratio</u> (Total Current Assets divided by Total Current Liabilities) 1.75 or greater 5 points 1.25 or greater, but less than 1.75 3 points Greater than 1.00 but less than 1.25 1 point Less than or equal to 1.00 0 points</p> | a) Most Recent Year | |
| | b) 2 nd Most Recent Year | |
| <p><u>Months of Working Capital</u> (Total Current Assets Less Total Current Liabilities for the year divided by one twelfth of the total expenses for the year as of the date of the financial statement) 1.75 or greater 5 points 1.25 or greater, but less than 1.75 3 points Greater than 0.80 but less than 1.25 1 point Less than or equal to 0.80 0 points</p> | c) Most Recent Year | |
| | d) 2 nd Most Recent Year | |
| <p><u>Independent Auditor's Report, Financial Statement Opinion</u> Financial Statements "present fairly..." 5 points Financial Statements "present fairly...except (minor)" 3 points Financial Statements "present fairly...except (major)" 1 point Unaudited Financial Statements presented 1 point Financial Statements "do not present fairly..." 0 points</p> | e) Most Recent Year | |
| | f) 2 nd Most Recent Year | |
| (Total Possible = 30) ADDED SCORES: | | |

Score (0-30): _____ **Evaluator Initials:** _____

| Topic | Max Points | Superior (81-100%) | Good (61-80%) | Adequate (41-60%) | Poor (21-40%) | Insufficient (0-20%) |
|----------------------------------------------|------------|--------------------|---------------|-------------------|---------------|----------------------|
| • Financial Stability / Financial Management | 30 | | | | | |

Financial Reply Criteria – Sub Criteria 2

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| <p>Criteria: The Vendor’s financial management approach, proposed budget and related financial information. (Note: This criterion will be evaluated by the Procurement Manager or the Budget Liaison. The Programmatic Evaluator shall not evaluate or score the Financial Reply)</p> |
| <p>Sub criteria: Budget</p> |
| <p><i>ITN Financial Reply Instructions:</i> The Vendor must submit detailed budget information. A Line Item Budget (Project Budget Summary), a Budget Narrative, a Fixed Price Budget Worksheet, and a Cost Allocation Plan must all be submitted with the reply to the ITN. Each of these categories is described below. The actual budget documents can also be found at the end of the ITN in Appendix VII, VIII, IX, X and XI. Please contact the Procurement Manager listed in Section 1.4 to request Word or Excel versions of any of the forms found in the Appendices.</p> |
| <p><i>ITN Related Text:</i> ITN Section: 4.3.3</p> |
| <p><i>Guidance:</i></p> <ul style="list-style-type: none"> • The financial reply includes an organized and thorough narrative that justifies each cost and explains how each cost was determined. Taking into account the budget narrative, the Vendor’s proposed budget appears reasonable and warranted. • All staff costs needed to operate the program are identified. Staff costs include a rate of pay, the amount of time devoted to the program, a narrative of fringe benefits provided and how they are determined, and a comparison of how the costs identified compare to other service providers in the service area offering similar services. • The estimated cost for individual line items is reasonable, allowable, and necessary. • The total amount for each federal fiscal year (FFY) is at or below the amount listed in Section 1.3 for all services in the Vendor’s reply. • The Vendor’s Cost Allocation Plan describes in detail all relevant funding sources and sensibly divides shared costs between those sources. • The Vendor presents a detailed Fixed Price Budget Worksheet that realistically estimates the cost of the various subcontracted services. • Allocations for personnel and any other line items in the Fixed Price Budget Worksheet are consistent with what was proposed in the Vendor’s programmatic reply. • The Vendor has described in detail how it arrived at its indirect cost rate. The Vendor explains its methodology and justifies the reasonableness of the proposed indirect cost rate. |

| Criteria: The Vendor's financial management approach, proposed budget and related financial information. (Note: This criterion will be evaluated by the Procurement Manager or the Budget Liaison. The Programmatic Evaluator shall not evaluate or score the Financial Reply) | | | | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|--------------------|---------------|----------------------------------|---------------|----------------------|
| Sub criteria: Budget | | | | | | |
| <i>Notes/Rationale:</i> | | | | | | |
| <i>Score (0-140):</i> _____ | | | | <i>Evaluator Initials:</i> _____ | | |
| Topic | Max Points | Superior (81-100%) | Good (61-80%) | Adequate (41-60%) | Poor (21-40%) | Insufficient (0-20%) |
| • Budget | 140 | | | | | |

Financial Reply Criteria – Sub Criteria3

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|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Criteria: The Vendor’s financial management approach, proposed budget and related financial information. (Note: This criterion will be evaluated by the Procurement Manager or the Budget Liaison. The Programmatic Evaluator shall not evaluate or score the Financial Reply)</p> |
| <p>Sub criteria: Cost Comparison</p> |
| <p><i>ITN Financial Reply Instructions:</i> N/A</p> |
| <p><i>ITN Related Text:</i> N/A</p> |
| <p><i>Guidance:</i> The Vendor’s <i>cost per client served</i> as compared to the lowest proposed <i>cost per client served</i> from a Vendor providing similar services. The Department will first examine the Vendor’s cost reply and determine the Vendor’s overall cost for services for the entire contract period. The Department will then determine how many clients the Vendor proposes to serve during that same contract period. The Department will divide the overall cost for services by the overall number of clients that the Vendor proposes to serve. This will provide the Department with the <i>cost per client served</i>. The Department will then consider all Vendors that have submitted a reply and will determine the lowest average <i>cost per client served</i>. The lowest <i>cost per client served</i> will then be divided by each Vendor’s <i>cost per client served</i>, and then multiplied by 30 to determine each Vendor’s score for this criterion.</p> |

Criteria:
The Vendor's financial management approach, proposed budget and related financial information. (Note: This criterion will be evaluated by the Procurement Manager or the Budget Liaison. The Programmatic Evaluator shall not evaluate or score the Financial Reply)

Sub criteria:
Cost Comparison

Notes/Rationale:

The Procurement Manager will assign a score corresponding to the Vendor's *cost per client served* for the project (see explanation above), relative to the lowest *cost per client served* of any responsive Vendor responding to this ITN. The following formula will be used to calculate the score for this criterion:

$$(Lowest Cost per Client Served / Vendor's Cost per Client Served) \times Total Possible Score = Vendor's Score$$

Score (0-30): _____

Evaluator Initials: _____

| Topic | Max Points | Superior (81-100%) | Good (61-80%) | Adequate (41-60%) | Poor (21-40%) | Insufficient (0-20%) |
|-------------------|------------|--------------------|---------------|-------------------|---------------|----------------------|
| • Cost Comparison | 30 | | | | | |