



**ADDENDUM #3 to the following Invitation to Negotiate (ITN):
Substance Abuse Training and Technical Assistance
Advertisement Number: ITN #02H17GN1**

Section 5.3.1, page 25, is hereby amended to read:

5.3.1 Scoring by Evaluators

A team of Department Evaluators will independently evaluate each Programmatic Reply and a separate team of Evaluators will score the Financial Reply in accordance with the following criteria:

Criteria	Points Value	Relative Value
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. 	220	85%
Financial Reply <ul style="list-style-type: none"> This 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. This 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) present the best value. The financial stability documentation provided by the vendor will be evaluated to determine the financial stability of the vendor. 	40	15%

Within each team, each member will independently evaluate each reply according to the manuals in **Appendix VIII - Program Evaluation Manual, Appendix IX – Financial Evaluation Manual.**

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.

Appendix VIII

State of Florida
Department of Children and Families
SUBSTANCE ABUSE AND MENTAL HEALTH



SUBSTANCE ABUSE TRAINING AND TECHNICAL ASSISTANCE

ITN# 02H17GN1

Program 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(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 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	Points
...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	4
...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	3
...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	2
...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	1
...a significant or complete lack of understanding, an incomprehensible approach, a significant or complete lack of skill and experience and extensive non-responsiveness.	Insufficient	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:
Michele Staffieri, Procurement Manager
E-Mail Address: Michele.staffieri@myflfamilies.com Phone: (850) 717-4354
- 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 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 received by the Department based on the following criteria:

- The vendor's articulation of its services and the ability of the services 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 track record providing services similar to the one specified in this ITN.
- The skills and experience of the vendor's leadership team, staff and resources the vendor will use in implementing its solution/services.

3 PROGRAMMATIC REPLY POINT VALUES

The maximum score for the Programmatic Reply is 220 points.

Programmatic Reply Criteria		Points	Weighted Value	Maximum Possible Points	Points Assigned By Evaluator
Criteria 1:	Epidemiological and Statistical Analysis	12	1	12	
Criteria 2:	Independent Reviews, Protocols and Tools	16	3	48	
Criteria 3:	Evidence-Based Practice (EBP) Fidelity Reviews, Protocols and Tools	16	3	48	
Criteria 4:	Resource Center	20	2	40	
Criteria 5:	Technical Assistance	12	3	36	
Criteria 6:	Program Analysis and Evaluation, Reports and Performance Measures	12	3	36	
Total		88		220	

<u>Criteria 1: Epidemiological and Statistical Analysis</u>	
Tab 4 - ITN References: Section 3.2.1	
Does the reply demonstrate the vendor's ability to provide epidemiological and statistical analysis?	Points (0-4 each)
<p>1. How well does the reply demonstrate the vendor's ability to analyze epidemiological and statistical data to identify substance abuse trends in the state of Florida?</p> <p>The reply should include a detailed description of the manner in which the vendor will identify substance use trends, what reports and information will be utilized in the process and the qualifications of any individuals identified to conduct analysis.</p>	
<p>2. How well does the reply demonstrate the vendor's ability to develop a comprehensive annual report?</p> <p>The reply should include a detailed approach in which reports will be developed, reviewed and verified to ensure accuracy of the information being reported.</p>	
<p>3. How well does the reply demonstrate the vendor's ability to identify emerging trends in the state of Florida and develop and implement a process for the electronic distribution of alerts throughout the state?</p> <p>The reply should include a description of a sound approach to identifying trends, including the data to be monitored, the person(s) responsible and the process for determining when a trend is evident as well as the process for the development and distribution of alerts.</p>	
Subtotal (Maximum 12 Points)	
Weighted Value	1
Total Points Assigned by Evaluator (Maximum Possible <u>12</u> Points)	
Comments:	

Criteria 2: Independent Reviews, Protocols and Tools	
Tab 4 - ITN References: Section 3.2.2 and 3.2.4	
Does the reply demonstrate the vendor's ability to conduct Independent Reviews?	Points (0-4 each)
<p>1. How well does the reply demonstrate the vendor's overall understanding of the purpose of Independent Reviews?</p> <p>The reply should indicate the vendor's knowledge of Independent Reviews and the importance of the integrity of the process, including who is most appropriate to conduct the reviews, the manner in which the reviews should be conducted and the importance of the findings or recommendations resulting from the reviews.</p>	
<p>2. How well does the reply demonstrate the vendor's approach and ability to develop protocols and tools for conducting Independent Reviews?</p> <p>The reply should include a description of the process for developing protocols and tools, including a description of each step in the process and identification of person(s) responsible.</p>	
<p>3. How well does the reply demonstrate the vendor's ability to identify, engage and train qualified individuals to conduct Independent Reviews?</p> <p>The reply should include a description of the manner in which the vendor will identify necessary qualifications for reviewers and the process for recruiting, selecting and training qualified individuals.</p>	
<p>4. How well does the reply demonstrate the vendor's ability to conduct Independent Reviews consistent with the developed and approved protocols and tools?</p> <p>The reply should include a description of the manner in which the vendor will monitor the provision of reviews to ensure fidelity to the approved protocol and proper use of review tools and the manner in which they will present their findings.</p>	
Subtotal (Maximum 16 Points)	
Weighted Value	3
Total Points Assigned by Evaluator (Maximum Possible <u>48</u> Points)	
Comments:	

Criteria 3: Evidence-Based Practice (EBP) Fidelity Reviews, Protocols and Tools	
Tab 4 - ITN References: Section 3.2.3 and 3.2.4	
Does the reply demonstrate the vendor’s ability to conduct Evidence-Based Practice (EBP) Fidelity Reviews?	Points (0-4 each)
<p>1. How well does the reply demonstrate the vendor’s overall understanding of the purpose of conducting EBP Fidelity Reviews?</p> <p>The reply should indicate the vendor’s knowledge of EBP Fidelity Reviews and the importance of the integrity of the process, including who is most appropriate to conduct the reviews, the manner in which the reviews should be conducted and the importance of the findings or recommendations resulting from the reviews.</p>	
<p>2. How well does the reply demonstrate the vendor’s approach and ability to develop protocols and tools for conducting EBP Fidelity Reviews?</p> <p>The reply should include a description of the process for developing protocols and tools, including a description of each step in the process and identification of person(s) responsible.</p>	
<p>3. How well does the reply demonstrate the vendor’s ability to identify, engage and train qualified peer mentors to conduct EBP Fidelity Reviews?</p> <p>The reply should include a description of the manner in which the vendor will identify necessary qualifications for peer mentors and the process for recruiting, selecting and training qualified individuals.</p>	
<p>4. How well does the reply demonstrate the vendor’s ability to conduct EBP Fidelity Reviews consistent with the developed and approved protocols and tools?</p> <p>The reply should include a description of the manner in which the vendor will monitor the provision of reviews to ensure fidelity to the approved protocol and proper use of review tools and the manner in which they will present their findings.</p>	
Subtotal (Maximum 16 Points)	
Weighted Value	3
Total Points Assigned by Evaluator (Maximum Possible <u>48</u> Points)	
Comments:	

Criteria 4: Resource Center	
Tab 4 - ITN References: Section 3.2.5	
Does the reply demonstrate the vendor's ability to maintain a web-based Resource Center?	Points (0-4 each)
<p>1. How well does the reply demonstrate the vendor's overall capacity to maintain a web-based Resource Center?</p> <p>The reply should provide details regarding the vendor's information technology resources sufficient to develop and maintain the web-based system.</p>	
<p>2. How well does the reply demonstrate the vendor's process to identify electronic materials, articles and resources related to behavioral health services and to advertise the availability of resources to providers and stakeholders?</p> <p>The reply should include a detailed process whereby behavioral health services information will be identified, reviewed and compiled in a logical manner and how those materials will be made available through the Resource Center.</p>	
<p>3. How well does the reply demonstrate the vendor's ability to maintain active links to all webinars and workshop materials?</p> <p>The reply should include details regarding the vendor's information technology capacity to develop and update the Resource Center on a regular basis as new webinars and workshops are developed and delivered, including details regarding user access.</p>	
<p>4. How well does the reply demonstrate the vendor's process for developing and disseminating a quarterly publication detailing the updates to the Resource Center?</p> <p>The reply should include information regarding the process for documenting updates to the Resource Center and the manner in which the vendor will ensure the Department, providers and stakeholders will be informed.</p>	
<p>5. How well does the reply describe the arrangement and organization of approved materials for exhibition at statewide conferences or meetings?</p> <p>The reply should include a summary of the process whereby the vendor will identify materials for exhibition and knowledge of appropriate statewide conferences or meetings.</p>	
Subtotal (Maximum 20 Points)	
Weighted Value	2
Total Points Assigned by Evaluator <i>(Maximum Possible 40 Points)</i>	
Comments:	

Criteria 5: Technical Assistance	
Tab 4 - ITN References: Section 3.2.6	
Does the reply demonstrate the vendor's ability to provide technical assistance?	Points (0-4 each)
<p>1. How well does the reply demonstrate the vendor's ability to host the required number of webinars on the topics identified in the ITN?</p> <p>The reply should demonstrate the vendor's capacity to develop webinars, including at a minimum, coordination with subject matter experts, development of resource materials and all web-based and technical aspects.</p>	
<p>2. How well does the reply demonstrate the vendor's ability to host comprehensive teleconference meetings both prior to and following EBP Fidelity Reviews?</p> <p>The reply should provide details related to the coordination of teleconferences with necessary parties, development of agendas and topics for discussion and the manner in which such meetings will be documented.</p>	
<p>3. How well does the reply demonstrate the vendor's overall ability to coordinate and host face-to-face workshops?</p> <p>The reply should outline the vendor's process in developing and delivering workshops, including at a minimum, coordination of all on-site logistics, registration and advertisement of workshops and development of resource materials.</p>	
Subtotal (Maximum 12 Points)	
Weighted Value	3
Total Points Assigned by Evaluator <i>(Maximum Possible <u>36</u> Points)</i>	
Comments:	

Criteria 6: Program Analysis and Evaluation, Reports and Performance Measures	
Tab 4 - ITN References: Section 3.2.7, 3.2.8 and 3.2.9	
Does the reply demonstrate the vendor's ability to provide ad hoc program analysis and evaluation, reports and performance measures?	Points (0-4 each)
<p>1. How well does the reply demonstrate the vendor's capacity to deliver ad hoc program analysis and evaluation, including the selection of subject matter experts and coordination of activities? The reply should outline the process whereby the vendor will develop a budget, obtain the services of qualified subject matter experts and ensure the provision of program analysis and evaluation.</p>	
<p>2. How well does the reply demonstrate the vendor's capacity to deliver accurate, timely and well-written reports? The reply should outline how the vendor intends to ensure timeliness of report submission, accuracy of information contained in reports and the process whereby reports will be reviewed, revised and edited for correct grammar and composition.</p>	
<p>3. How well do the proposed performance measures, targets and methodology demonstrate the vendor's ability to deliver quality training and technical assistance services? The reply should include a minimum of 3 proposed performance measures, targets and methodologies designed to measure the quality of services provided.</p>	
Subtotal (Maximum 12 Points)	
Weighted Value	3
Total Points Assigned by Evaluator (Maximum Possible <u>36</u> Points)	
Comments:	

Appendix IX

State of Florida
Department of Children and Families
SUBSTANCE ABUSE AND MENTAL HEALTH



SUBSTANCE ABUSE TRAINING AND TECHNICAL ASSISTANCE

ITN# 02H17GN1

Financial Evaluation Manual

Evaluator Name: _____

Vendor Name: _____

Date: _____

Evaluator Signature: _____

GENERAL INSTRUCTIONS

- 1.1 Each evaluator will evaluate the Financial Reply for all applicant 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 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, unless otherwise noted for the criteria:

IF, in your judgment the reply demonstrates and/or describes...	Category	Points
...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	4
...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	3
...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	2
...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	1
...a significant or complete lack of understanding, an incomprehensible approach, a significant or complete lack of skill and experience and extensive non-responsiveness.	Insufficient	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 addenda, and applicant written inquiries and the written responses provided by the Department. Each evaluator will also be provided with a copy of each Financial Stability 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 Only the rating sheets provided should 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/Procurement Advisors.
- 1.9 Questions related to the solicitation and the evaluations of the reply should be directed only to:
Michele Staffieri, Procurement Manager
Florida Department of Children and Families
Office of Substance Abuse and Mental Health
1317 Winewood Blvd., Bldg 6, Room 231
Tallahassee, FL 32399-0700
E-Mail Address: Michele.staffieri@myflfamilies.com
- 1.10 After each evaluator has completed the scoring of each Financial Reply, the scores are then submitted to the Procurement Manager for compilation. The Procurement Manager will average the total Financial Reply 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 Financial Reply scores.

2 QUALITATIVE CRITERIA

Evaluators shall assign scores to each of the replies received by the Department based on the criteria detailed for each subcriteria.

3 FINANCIAL REPLY POINT VALUES

The maximum score for the Financial Reply is 40 points.

	Financial Reply Criteria	Points	Weighted Value	Maximum Points	Points Assigned
Criteria 1: Budget					
1	Budget Summary	8	1	8	
2	Budget Narrative	12	2	24	
3	Financial Stability	4	2	8	
	Total	24		40	

<u>Criteria 1: Budget Summary & Narrative</u>	
Tab 2 - ITN Reference: Section 4.3.3	
Does the proposed budget summary demonstrate the vendor's ability to provide services within the allocated funding (\$500,000/year)?	Points (0-4 each)
<p>1. Does the proposed budget summary outline the proposed costs associated with the provision of services? If the proposed budget includes any variation in costs over the term of the contract are the changes explained and justified?</p> <p>The reply should include an annualized budget.</p> <p>Notes:</p>	
<p>2. Does the proposed budget narrative include details sufficient to determine the calculation and basis for proposed costs?</p> <p>The reply should include a consistent 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.</p> <p>Notes:</p>	
Subtotal <i>(Max 8 Points)</i>	
Weighted Value	1
Total Points <i>(Max 8 Points)</i>	

<u>Criteria 2: Budget Narrative</u>	
Tab 2 - ITN Reference: Sections 4.3.3	
Does the proposed budget demonstrate reasonable, allowable, and necessary costs?	Points (0-4 each)
1. Does the budget and narrative demonstrate that the total proposed costs associated with the provision of services are reasonable ? Notes:	
2. Does the budget narrative demonstrate that the total proposed costs associated with the provision of services are allowable ? Notes:	
3. Does the budget narrative demonstrate that the total proposed costs associated with the provision of services are necessary ? Notes:	
Subtotal (<i>Max 12 Points</i>)	
Weighted Value	2
Total Points (<i>Max 24 Points</i>)	

