

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



**ITN# - DCF ITN 2021 008
Community-Based Care Lead Agency for Circuits 2 and 14**

ITN Financial Evaluation Manual

Evaluator Name: _____

Vendor Name: _____

Date of Reply Evaluation: _____

Evaluator Signature: _____

1 GENERAL INSTRUCTIONS

- 1.1 Each financial 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 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.	Exceptional	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 financial 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 replies provided by the Department. Each evaluator will also be provided with a copy of each financial 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 Officer. If such an attempt is made by the Procurement Officer, the evaluator must immediately report the incident to the Inspector General.
- 1.7 The Procurement Officer 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 Officer and Subject Matter Experts via the Procurement Officer.
- 1.10 Questions related to the solicitation and the evaluations of the reply should be directed only to:
Kimberly Houlios, Procurement Officer
Florida Department of Children and Families
Office of Contracted Client Services
2415 North Monroe St., Suite G203
Tallahassee, FL 32303
E-Mail Address: Kimberly.Houlios@myflfamilies.com
- 1.11 After each evaluator has completed the scoring of each financial reply, the scores are then submitted to the Procurement Officer for compilation. The Procurement Officer will average the total financial point scores by each evaluator to calculate the points awarded for each section along with the programmatic scoring for each vendor. Programmatic scoring is conducted by programmatic evaluators. The two scores are added together with the highest scorer being awarded.
- 1.12 Following completion of the independent evaluations of the replies, the Procurement Officer 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 scores.

2 QUALITATIVE CRITERIA

Evaluators shall assign scores to each of the replies received by the Department based on 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, the requirements of this ITN and Appendix I, Attachment I
- The innovation of the approach and solution
- Vendor references and track record implementing similar solutions to the one specified in this ITN
- Experience and skills of proposed staff relative to the proposed approach and solution

3 FINANCIAL REPLY POINT VALUES

The maximum score for the Financial Reply is 300 points.

Financial Criteria	Relative Value	Possible Points
<ul style="list-style-type: none"> The Vendor's financial management approach, including proposed service efficiencies and re-investment and ongoing approach to reduce administrative costs and expand services. Additionally, the vendor's ability to meet local match requirements as outlined in Section 4.3.2.4. 	20%	200
<ul style="list-style-type: none"> The Vendor's proposed budget. 	10%	100
TOTAL	30%	300

Reference	Financial Criteria I– Financial Information (Possible Points 200)	Total Possible Points	Points Awarded
Section 4.3.2.1.	<p>1. To what extent does the vendor’s reply describe its current financial management and accounting systems and capability? Does the vendor include all applicable financial statements, auditor’s reports, management letters, and any corresponding re-issued audit components?</p> <p>(Insufficient – 8; Poor – 16; Adequate – 24; Good – 32; Exceptional – 40)</p>	40	
Section 4.3.2.2.	<p>2. Evaluate the adequacy of the vendor’s reply regarding plans to develop efficiencies in the services being provided. Also, evaluate the adequacy of this plan, the vendor’s ability to show how the cost reduction or added services that are realized from these efficiencies will be re-invested into the required services.</p> <p>(Insufficient – 11; Poor – 22; Adequate – 33; Good – 44; Exceptional – 55)</p>	55	
Section 4.3.2.3.	<p>3. Evaluate the adequacy of the vendor’s ongoing approach to reduce administrative cost, without affecting the quality of the services.</p> <p>(Insufficient – 11; Poor – 22; Adequate – 33; Good – 44; Exceptional – 55)</p>	55	
Section 4.3.2.4	<p>4. To what extent does the vendor’s reply describe the vendor’s ability to meet Local Match requirements?</p> <p>(Insufficient – 10; Poor – 20; Adequate – 30; Good – 40; Exceptional – 50)</p>	50	
TOTAL		200	

Programmatic Criteria I- Financial Information
Notes/Rationale:

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Reference	Financial Criteria II- Budget (Possible Points 100)	Total Possible Points	Points Awarded
Section 4.3.3.	The vendor must submit detailed budget information. A Line Item Budget (Project Budget Summary), a Budget Narrative, and a Cost Allocation Plan must all be submitted with the reply to the ITN.		
Section 4.3.3.1.	1. Evaluate the adequacy of the vendor's reply regarding the Line Item Budget. (Insufficient – 6.8; Poor – 13.6; Adequate – 20.4; Good – 27.2; Exceptional – 34)	34	
Section 4.3.3.2.	2. Evaluate the adequacy of the vendor's reply regarding the Budget Narrative. (Insufficient – 6; Poor – 12; Adequate – 18; Good – 24; Exceptional – 30)	30	
Section 4.3.3.3.	3. Evaluate the adequacy of the vendor's reply regarding the Cost Allocation Plan. (Insufficient – 7.2; Poor – 14.4; Adequate – 21.6; Good – 28.8; Exceptional – 36)	36	
TOTAL		100	

Programmatic Criteria II- Budget	
Notes/Rationale:	