

TECHNICAL EVALUATION CRITERIA PHASE I – PRE-EVALUATION REVIEW – ATTACHMENT CHECKLIST

The CDE will review the contents of the Attachment Checklist for the presence of all correctly completed required forms/attachments. Bidders will be rated based on Pass/Fail. Proposals that do not provide all of the forms/attachments, correctly completed as required by the RFP, may be deemed as non-responsive which may result in the elimination of the bidder's Proposal from further consideration. For a proposal to be considered the Intent to Submit a Proposal must have been received by the CDE at the time, day, and date specified in the RFP Section 2.3, refer to RFP Section 2.5 Intent to Submit a Proposal.

TECHNICAL PROPOSAL

1. Technical Proposal as stated in this RFP
2. Bidder Certification Sheet (Attachment 1)
3. Technical Proposal Staffing Labor Hours Worksheets (Attachment 2)
4. Contractor Certification Clauses (Attachment 4). The CCC 04/2017 can be accessed at:
<https://www.dgs.ca.gov/OLS/Resources/Page-Content/Office-of-Legal-Services-Resources-List-Folder/Standard-Contract-Language>
5. Federal Certifications (Attachment 5)
6. Darfur Contracting Act Certification (Attachment 6 or 6a)
7. California Civil Rights Laws Certification (Attachment 7)
8. Bidder References (Attachment 8)
9. Bidder Declaration (GSPD-05-105), if applicable. The GSPD-05-105 can be accessed at:
<https://www.documents.dgs.ca.gov/dgs/fmc/gspd/gspd05-105.pdf>. GSPD-05-105 must identify all proposed subcontractors.
 - On the GSPD-05-105, proposal must identify a subcontractor who is “the organization designated by the United States Department of Education to assist states in improving special education dispute resolution systems” per SB 129.
10. Signed Commitment Letter(s) from each subcontractor.
 - A signed commitment letter must be provided from the subcontractor who is “the organization designated by the United States Department of Education to assist states in improving special education dispute resolution systems” per SB 129.

11. Payee Data Record (STD. 204). STD. 204 can be accessed at:

<http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std204.pdf>

- Payee Data Record Supplement (STD. 205), included if applicable. STD. 205 can be accessed at: <https://www.documents.dgs.ca.gov/dgs/fmc/pdf/std205.pdf>

12. Copy of the bidding firm's most current Certificate of Good Standing issued by the California Secretary of State or a separate paragraph that clearly states the bidder's legal status and evidence that the bidder is legally constituted and qualified to do business with the State of California.

13. Attachment Checklist (Attachment 10)

14. DVBE Certification printed from Cal eProcure, for each DVBE contractor/subcontractor, if applicable. Cal eProcure can be accessed at:

<https://caleprocure.ca.gov/pages/PublicSearch/supplier-search.aspx>

- Minimum 3% DVBE commitment has been met (RFP Attachment 3, RFP Section 3.1.7, and RFP Section 3.2.14).

15. DVBE Declaration (STD. 843). The DVBE Declaration must be completed for each DVBE contractor/subcontractor, if applicable. The form can be accessed at:

https://www.documents.dgs.ca.gov/dgs/fmc/gs/pd/pd_843.pdf.

COST PROPOSAL

1. Cost Proposal (refer to RFP Section 3.3) is packaged, sealed, and submitted separately from the Technical Proposal (refer to RFP Section 3).

NOTE: All parts of the Cost Proposal MUST be packaged and submitted separately from the Technical Proposal package. No Cost information of any kind is allowed in the Technical Proposal/Technical Proposal package. Cost information included in any section or in any required attachment to the Technical Proposal may result in disqualification and removal of the proposal from further review at the sole discretion of the CDE.

OPTIONAL FORMS/ATTACHMENTS

Submitting any of the following form(s) is optional. Not submitting the following form(s) only signifies that the bidder has not opted for the pertinent Preference Program (See RFP Section 3.2.15) listed and the bidder will not be deemed as being non-responsive for not providing any of the following optional forms/attachments.

The bidder has opted for the following Preference Program(s) and has submitted the required forms/attachments:

1. Small Business Preference Sheet (Attachment 9), if applying for the preference.
2. Target Area Contract Preference Act (TACPA) Preference (STD. 830). STD. 830 can be accessed at: <http://www.documents.dgs.ca.gov/dgs/fmc/pdf/std830.pdf>

RESULTS OF PHASE I – PRE-EVALUATION REVIEW – ATTACHMENT CHECKLIST

Bidders will be rated based on Pass/Fail. Proposals that do not provide all the forms/attachments, correctly completed as required by the RFP, may be deemed as non-responsive which may result in the elimination of the bidder's Proposal from further consideration.

1. Intent to Submit a Proposal (Attachment 11) was received by the time, day, and date specified in RFP Section 2.3, in accordance with RFP Section 2.5.

PASS OR FAIL

2. All required forms/attachments as required by RFP Section 3 and Attachment Checklist (Attachment 10).

PASS OR FAIL

3. No Cost information of any kind is included in the Technical Proposal or any part of the Technical Proposal package.

PASS OR FAIL

4. Cost information was included in the Technical Proposal or Technical Proposal package and as a result the bidder's Proposal has been eliminated from further consideration.

YES (FAIL) OR NO (PASS)

5. The required forms/attachments not checked in checklist above were not provided by the bidder as required by RFP Section 3 and Attachment Checklist (Attachment 10) and as a result the bidder's Proposal has been eliminated from further consideration.

YES (FAIL) OR NO (PASS)

6. The required forms/attachments not checked in checklist above were not correctly completed by the bidder as required by RFP Section 3 and the Attachment Checklist (Attachment 10) and as a result the bidder's Proposal has been eliminated from further consideration.

YES (FAIL) OR NO (PASS)

PHASE II – TECHNICAL PROPOSAL EVALUATION

An evaluation panel will convene to evaluate the proposals using a consensus process. A minimum of 288 out of 320 is required for a proposal to advance to Public Opening of the Cost Proposal.

RFP Section 7. Scope of Project, Task 1 – Coordination and Communications with the CDE

When evaluating the bidder's Technical Proposal for this section, please consider carefully the following guiding questions and the information requirements contained in Task 1 including subtasks before assigning the consensus score.

How well does the bidder's proposal demonstrate its capability to:

1. Plan and conduct the Orientation Meeting as described in Task 1.1?
2. Comply with Contract Planning Meetings as described in Task 1.2?
3. Plan and conduct Bi-Monthly (twice monthly) Management Meetings as specified in Task 1.3?
4. Meet the CDE Approval Schedule Requirements as described in Task 1.4?
5. Coordinate with Contractors and the CDE as described in Task 1.5?

Task 1 Consensus score: <Your Score> out of 20 points possible

RFP Section 3.1. Technical Proposal Requirements, Task 1 – Coordination and Communications with the CDE

When evaluating the bidder's proposal for this section, please carefully consider the following questions and the requirements contained in Section 3.1 in relation to the services described in Task 1 including subtasks of the RFP before assigning the consensus score.

1. To what extent does the proposed project staff have the organization structure, management capability, competency and expertise, and related experience to perform Task 1?
2. To what extent does the proposed project staff have the personnel resources (e.g., hours) by fiscal year to perform Task 1?
3. To what extent do the bidder and the bidder's proposed subcontractor(s), if any, have the facilities, resources, equipment, technical capacity, and experience to perform the work required by Task 1?
4. To what extent do the bidder and the bidder's proposed subcontractor(s), if any, possess sufficient professional qualifications and experience for Task 1?

Section 3.1, Task 1 Consensus score: <Your Score> out of 10 points possible

RFP Section 7. Scope of Project, Task 2 – Reports, Invoices, and Data File Requirements

When evaluating the bidder's Technical Proposal for this section, please consider carefully the following guiding questions and the information requirements contained in Task 2 including subtasks before assigning the consensus score.

How well does the bidder's proposal demonstrate its capability to:

1. Include and meet the specifications of the Monthly Written Progress Reports as described in Task 2.1?
2. Meets the specifications of the Final Summary Project Report as described in Task 2.2?
3. Include and meet the data file and reporting specifications as described in Task 2.3?

Task 2 Consensus score: <Your Score> out of 20 points possible

RFP Section 3.1. Technical Proposal Requirements, Task 2 – Reports, Invoices, and Data File Requirements

When evaluating the bidder's proposal for this section, please carefully consider the following questions and the requirements contained in Section 3.1 in relation to the services described in Task 2 including subtasks of the RFP before assigning the consensus score.

1. To what extent does the proposed project staff have the organization, management capability, competency and expertise, and related experience to perform Task 2?
2. To what extent does the proposed project staff have the personnel resources (e.g., hours) by fiscal year to perform Task 2?
3. To what extent do the bidder and the bidder's proposed subcontractor(s), if any, have the facilities, resources, equipment, technical capacity, and experience to perform the work required by Task 2?
4. To what extent do the bidder and the bidder's proposed subcontractor(s), if any, possess sufficient professional qualifications and experience for Task 2?

Section 3.1, Task 2 Consensus score: <Your Score> out of 10 points possible

RFP Section 7. Scope of Project, Task 3 – Comprehensive Plan and Schedule for Project Activities and Deliverables

When evaluating the bidder's Technical Proposal for this section, please consider carefully the following guiding questions and the information requirements contained in Task 3 including subtasks before assigning the consensus score.

How well does the bidder's proposal demonstrate its capability to:

1. Provide a detailed Narrative Schedule and Timeline that demonstrates the successful and timely completion of all tasks/subtasks outlined in the RFP, as described in Task 3.1?

Task 3 Consensus score: <Your Score> out of 20 points possible

RFP Section 3.1. Technical Proposal Requirements, Task 3 – Comprehensive Plan and Schedule for Project Activities and Deliverables

When evaluating the bidder's proposal for this section, please carefully consider the following questions and the requirements contained in Section 3.1 in relation to the services described in Task 3 including subtasks of the RFP before assigning the consensus score.

1. To what extent does the proposed project staff have the organization, management capability, competency and expertise, and related experience to perform Task 3?
2. To what extent does the proposed project staff have the personnel resources (e.g., hours) by fiscal year to perform Task 3?
3. To what extent do the bidder and the bidder's proposed subcontractor(s), if any, have the facilities, resources, equipment, technical capacity, and experience to perform the work required by Task 3?
4. To what extent do the bidder and the bidder's proposed subcontractor(s), if any, possess sufficient professional qualifications and experience for Task 3?

Section 3.1, Task 3 Consensus score: <Your Score> out of 10 points possible

RFP Section 7. Scope of Project, Task 4 – Invested Educational Partner Engagement Activities

When evaluating the bidder's Technical Proposal for this section, please consider carefully the following guiding questions and the information requirements contained in Task 4 including subtasks before assigning the consensus score.

How well does the bidder's proposal demonstrate its capability to:

1. Describe and demonstrate how the bidder will execute tasks as specified for Invested Educational Partner Engagement Activities, as specified in Task 4.1?

Task 4 Consensus score: <Your Score> out of 40 points possible

RFP Section 3.1. Technical Proposal Requirements, Task 4 – Invested Educational Partner Engagement Activities

When evaluating the bidder's proposal for this section, please carefully consider the following questions and the requirements contained in Section 3.1 in relation to the services described in Task 4 including subtasks of the RFP before assigning the consensus score.

1. To what extent does the proposed project staff have the organization, management capability, competency and expertise, and related experience to perform Task 4?

2. To what extent does the proposed project staff have the personnel resources (e.g., hours) by fiscal year to perform Task 4?
3. To what extent do the bidder and the bidder's proposed subcontractor(s), if any, have the facilities, resources, equipment, technical capacity, and experience to perform the work required by Task 4?
4. To what extent do the bidder and the bidder's proposed subcontractor(s), if any, possess sufficient professional qualifications and experience for Task 4?

Section 3.1, Task 4 Consensus score: <Your Score> out of 40 points possible

RFP Section 7. Scope of Project, Task 5 – Implementation Report

When evaluating the bidder's Technical Proposal for this section, please consider carefully the following guiding questions and the information requirements contained in Task 5 including subtasks before assigning the consensus score.

How well does the bidder's proposal demonstrate its capability to:

1. Develop and incorporate all components of the implementation report as described in Task 5.1?

Task 5 Consensus score: <Your Score> out of 40 points possible

RFP Section 7. Technical Proposal Requirements, Task 5 – Implementation Report

When evaluating the bidder's proposal for this section, please carefully consider the following questions and the requirements contained in Section 3.1 in relation to the services described in Task 5 including subtasks of the RFP before assigning the consensus score.

1. To what extent does the proposed project staff have the organization, management capability, competency and expertise, and related experience to perform Task 5?
2. To what extent does the proposed project staff have the personnel resources (e.g., hours) by fiscal year to perform Task 5?
3. To what extent do the bidder and the bidder's proposed subcontractor(s), if any, have the facilities, resources, equipment, technical capacity, and experience to perform the work required by Task 5?
4. To what extent do the bidder and the bidder's proposed subcontractor(s), if any, possess sufficient professional qualifications and experience for Task 5?

Section 5.1, Task 1 Consensus score: <Your Score> out of 40 points possible

RFP Section 3.1. Technical Proposal Requirements, 3.1.3 Organization Structure and Personnel Resources

When evaluating the bidder's proposal for this section, please carefully consider the following questions and the requirements contained in Section 3.1.3 in relation to the overall proposal before assigning the consensus score.

How well does the bidder's proposal:

1. Include and meet the specifications of the Technical Proposal Requirements, 3.1.3 Organization Structure and Personnel Resources as specified in Section 3.1.3?
2. Identify, describe and demonstrate that the assigned Project Manager meets or exceeds the requirements as specified in Section 3.1.3?
3. Identify, describe and demonstrate that the assigned Fiscal Manager meets or exceeds the requirements as specified in Section 3.1.3?
4. Identify by name and position title all Key Personnel as required in RFP Section 3.1.3?
5. Describe and demonstrate how the Key Personnel meet or exceed the requirements as specified in Section 3.1.3?
6. Specify that the bidder will comply with the Changes to Key Personnel requirements as specified in Section 3.1.3?
7. Provide resumes for the Project Manager, Fiscal Manager, and all Key Personnel as specified in Section 3.1.3?
8. Address the Subcontractor requirements required in Section 3.1.3? Including, "designate at least \$50,000 of the contract amount to work in consultation with the organization designated by the United States Department of Education to assist states in improving special education dispute resolution systems" pursuant to SB 129.
9. Describe and demonstrate that the proposed Key Personnel and Subcontractors possess the qualifications and experience to perform the work required by this project?
10. Provide an organization chart as required in Section 3.1.3?
11. Provide for allocation of sufficient labor hours per position per task and per fiscal year as required in Section 3.1.3?
12. Demonstrate a clear connection between proposed activities, by task/subtask, and labor hours?

Section 3.1.3 Consensus score: <Your Score> out of 30 points possible

RFP Section 3.1.4 Capacity

When evaluating the bidder's proposal for this section, please consider carefully the following guiding questions and the requirements contained in RFP Section 3.1.4 in relation to the overall proposal before assigning the consensus score.

How well does the bidder's proposal:

1. Include and meet the requirements of the Technical Proposal Requirements, 3.1.4 Capacity required in Section 3.1.4?

Section 3.1.4 Consensus score: <Your Score> out of 20 possible points

RFP Section 3.1 Technical Proposal Requirements, 3.1.5 Facilities and Resources, and 3.1.6 Bidder References

When evaluating the bidder's proposal for this section, please consider carefully the following guiding questions and the information requirements contained in RFP Section 3.1.5, and 3.1.6 in relation to the overall proposal before assigning the consensus score.

How well does the bidder's proposal:

1. Include and meet the specifications of the Technical Proposal Requirements, 3.1.5 Facilities and Resources, and 3.1.6 Bidder References required in Section 3.1.5 and 3.1.6?

Section 3.1.5, and 3.1.6 Consensus score: <Your Score> out of 20 possible points

PHASE II – TECHNICAL PROPOSAL EVALUATION – TOTAL SCORESHEET

Bidder Name: <Enter Name of Bidder Here>

RFP Section/Task

- RFP Section 7 Scope of Project, Task 1 – Coordination and Communications with the CDE,
20 possible points
Consensus Score: <Your Score>
- RFP Section 3.1 Technical Proposal Requirements, Task 1 – Coordination and Communications with the CDE,
10 possible points
Consensus Score: <Your Score>
- RFP Section 7 Scope of Project, Task 2 – Reports, Invoices, and Data File Requirements,
20 possible points
Consensus Score: <Your Score>
- RFP Section 3.1 Technical Proposal Requirements, Task 2 – Reports, Invoices, and Data File Requirements,
10 possible points
Consensus Score: <Your Score>
- RFP Section 7 Scope of Project, Task 3 – Comprehensive Plan and Schedule for Project Activities and Deliverables,
20 possible points
Consensus Score: <Your Score>
- RFP Section 3.1 Technical Proposal Requirements, Task 3 – Comprehensive Plan and Schedule for Project Activities and Deliverables,
10 possible points
Consensus Score: <Your Score>
- RFP Section 7 Scope of Project, Task 4 – Invested Educational Partner Engagement Activities,
40 possible points
Consensus Score: <Your Score>
- RFP Section 3.1 Technical Proposal Requirements, Task 4 – Invested Educational Partner Engagement Activities,

40 possible points

Consensus Score: <Your Score>

- RFP Section 7 Scope of Project, Task 5 – Implementation Report

40 possible points

Consensus Score: <Your Score>

- RFP Section 3.1 Technical Proposal Requirements, Task 5-Implementation Report

40 possible points

Consensus Score: <Your Score>

- RFP Section 3.1 Technical Proposal Requirements, 3.1.3 Organization Structure and Personnel Resources,

30 possible points

Consensus Score: <Your Score>

- RFP Section 3.1 Technical Proposal Requirements, 3.1.4 Capacity,

20 possible points

Consensus Score: <Your Score>

- RFP Section 3.1 Technical Proposal Requirements, 3.1.5 Facilities and Resources; 3.1.6. Bidder References,

20 possible points

Consensus Score: <Your Score>

Phase II Technical Proposal Evaluation Total Score: <Your Score> out of 320 possible points.

The total proposal score must be equal to or greater than 288 out of 320 possible points to continue to the Public Opening of the Cost Proposal.

PUBLIC OPENING OF THE COST PROPOSAL – COST PROPOSAL EVALUATION

A minimum of 288 of 320 points in Phase II, Technical Proposal Evaluation, is required for a bidder to advance to the Public Opening of the Cost Proposal. Each opened cost proposal will be evaluated according to the following criteria.

ADHERENCE TO COST PROPOSAL REQUIREMENTS

This step is rated on a YES or NO basis. Receipt of a NO on any of the following may result in elimination of the proposal from further consideration and review. CDE reserves the right, at its sole discretion, to overlook, correct, or require a bidder to remedy any obvious clerical or incidental mathematical errors on a proposal, if the correction does not result in an increase in the bidders' total price.

As specified in RFP Section 3.3, the Cost Proposal must contain or specify at a minimum the following:

Cost Proposal Requirements

- A. One clearly marked ORIGINAL Cost Proposal, three copies, and one electronic copy (must be separate from the Technical Proposal's electronic copy) submitted in a separate, sealed envelope or package and received by the date and time specified in the RFP Section 2.3 at the California Department of Education.

YES or NO

- B. The CDE Contracts Office has determined the Cost Proposal meets the criteria specified in RFP Section 3.3.

YES or NO

- C. Cost Proposal Cover Sheet: The Cover Sheet indicates the TOTAL amount for the overall contract without any cost breakdown.

YES or NO

- D. Summary of All Costs for Total Project: Includes a Summary of all Costs for Total Project for all fiscal years, including parts thereof, as specified in Section 3.3.

YES or NO

- E. Task and Subtask Detail for Contractor and for Each Subcontractor for Each Fiscal Year: Includes a Task and Subtask Detail for Contractor and for each Subcontractor for each fiscal year, or portion of fiscal year, as specified in Section 3.3.

YES or NO

- F. Task and Subtask Detail for Contractor and for Each Subcontractor for Each Fiscal Year: Must include detailed labor costs including hourly rates, number of labor hours for each job position title/name for each task and subtask. Costs are accurately computed for each task and subtask using the hourly rate and number of labor hours, and a total is included for each task and subtask.

YES or NO

- G. Task and Subtask Detail for Contractor and for Each Subcontractor for Each Fiscal Year: The number of labor hours for each job position title/name must correspond with the labor hours, job position title/name contained in the Technical Proposal Staffing Labor Hours Worksheet (Attachment 2). (Failure to do so may result in the disqualification of the proposal.)

YES or NO

Other Direct Costs, Overhead/Indirect Costs

- A. Other Direct Costs: Includes an itemized detailed narrative description of direct costs to specify what is included for any proposed direct costs and does not include any labor costs.

YES or NO

- B. Overhead/Indirect Costs (if any): Identifies the rate of the indirect costs and includes a detailed narrative description to specify what is included for any indirect costs rates proposed. Indirect costs must not cover costs covered under other costs identified in the Cost Proposal. Pursuant to SB 129 the bidder is not permitted to charge more than the "maximum of 8 percent indirect cost rate." Cost Proposals which contain an indirect cost rate which exceeds the 8 percent maximum will be disqualified.

YES or NO

Travel Costs (if any)

- A. Travel and per diem rates do not exceed rates established for the State of California's non-represented employee's, computed in accordance with and allowable pursuant to applicable California Department of Human Resources regulations, see Attachment 14, California State Travel Program.

YES or NO

Subcontractor Costs (if any)

- A. Separate Cost Worksheets are provided for each subcontractor and for each fiscal year, or part thereof.

YES or NO

The contract shall be awarded to the lowest responsible bidder (A responsive bidder is defined as a bidder who successfully advanced from Phase I Pre-Evaluation Review Attachment Checklist and Phase II Technical Proposal Evaluation, and advanced to the Public Opening of the Cost Proposal and successfully passed the Cost Proposal Evaluation, with the lowest total bid amount.)

If no proposals are received containing bids offering a price, which in the opinion of the CDE is a reasonable price, CDE is not required to award an Agreement (PCC 10344 [d]).

Every component of the cost is subject to reasonableness of cost justification to the Department of General Services (DGS), who may approve it at its discretion. If any portion of the cost is rejected by DGS, then the entire bid will be rejected.