



Florida Agency for Workforce Innovation

Unemployment Compensation
Claims and Benefits Information System (UCCBIS)
ITN Evaluation Training

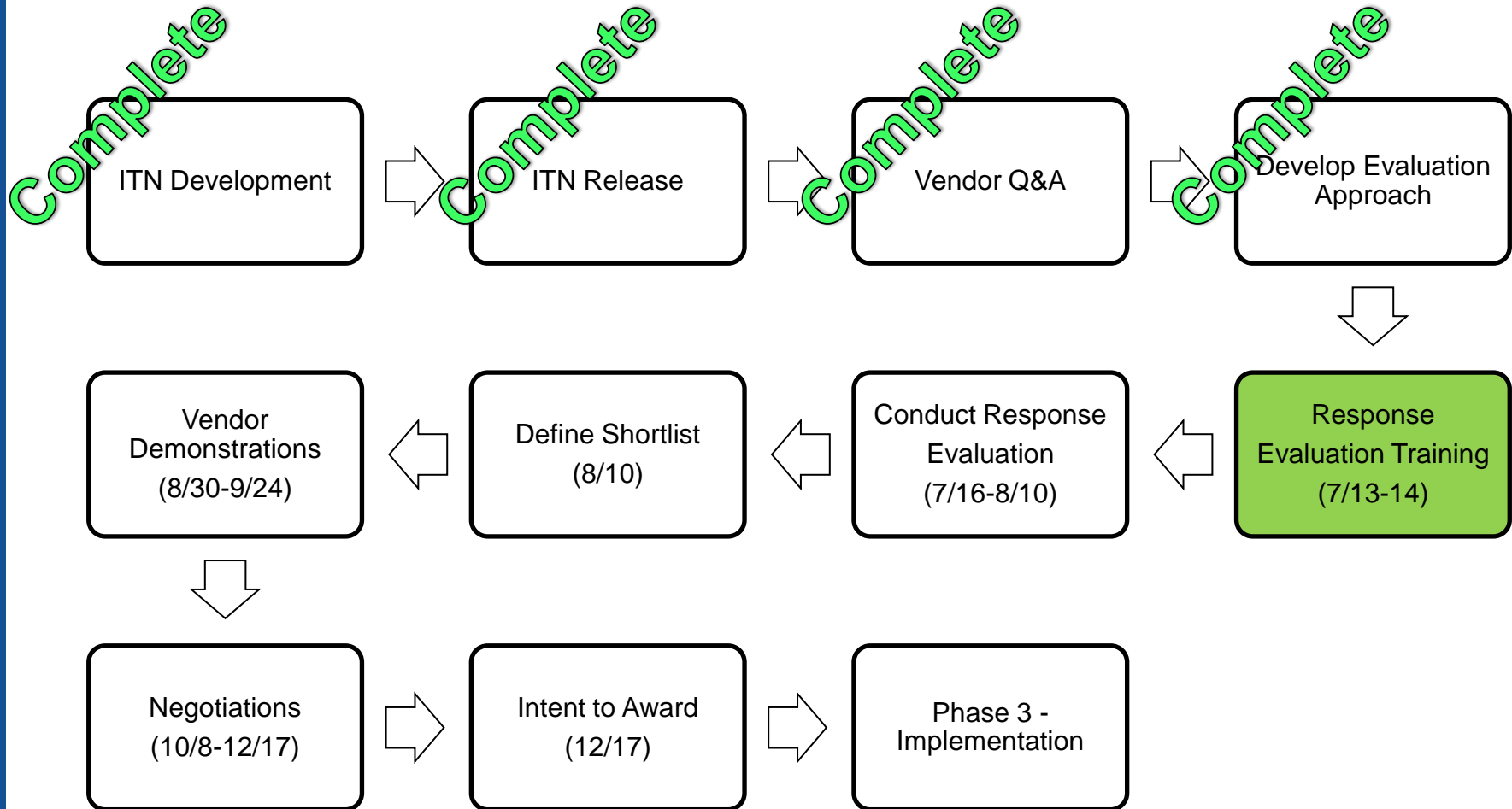
July 13-14, 2010

Agenda



- UC Modernization Procurement Process
- UC Modernization Procurement Schedule
- Intents to Submit Response Received
- ITN Section B.12 Response Evaluation
- Key Elements of an Evaluation
- Evaluation Committee Members & Advisors
- Evaluation Committee Roles & Responsibilities
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- Scoring Guidance
- Do's
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UC Modernization Procurement Process



Note: Dates may shift if more than six responses to the ITN are received.

UC Modernization Procurement Schedule



Event	Date(s)	Status
Release of ITN	Friday, May 14, 2010	Complete
Technical Questions Regarding ITN due to the Agency	Friday, June 14, 2010	Complete
Pre-Reply Conference (Mandatory)	Thursday, June 3, 2010	Complete
Agency Responds to Technical Questions Posting of Addendum 1	Friday, June 18, 2010	Complete
Intent to Submit Responses received by the Agency	Thursday, June 24, 2010	Complete
Responses due to the Agency	Friday, July 16, 2010	Not Started
Posting of Respondent Shortlist & Notice of Demonstrations & Preliminary Negotiations	Tuesday, August 10, 2010	Not Started
Demonstrations & Preliminary Negotiations	Monday, August 30, 2010 – Friday, September 24, 2010	Not Started
Public Meeting Notice of Intent to Negotiate	Monday, October 4, 2010 Friday, October 8, 2010	Not Started
Contract Negotiations	Monday, October 18, 2010 through Friday, December 10, 2010	Not Started
- Public Meeting - Posting of Intent to Award Notice	Monday, December 13, 2010 Friday, December 17, 2010	Not Started
Anticipated Contract Start Date	Monday, February 28, 2010	Not Started



The Agency received an Intent to Submit Response from...

Company
Accenture LLP
Capgemini Government Solutions, LLC
Deloitte Consulting LLP
Geographic Solutions, Inc.
HCL America, Inc.
IBM
Tata America International Corporation (TCS)
WiPro, Inc.
Yang Enterprises, Inc.

ITN Section B.12 Response Evaluation



- 1. Scoring** - Each section or sub-section will be reviewed by at least three evaluators, working independently. The completed evaluation scoring forms will be forwarded to the Procurement Office for inclusion in the final score. Evaluations are due to Purchasing on Wednesday, August 4 by 5:00 p.m.

- 3. Short-list** - A short-list of the highest ranking Respondents will be generated based on the calculated and summarized totals of the response scoring. The Agency reserves the right to short-list and negotiate with up to four (4) Respondents based on the ITN evaluation phase. The Agency will conduct a public meeting to discuss and decide the Respondents selected to make the short-list. The selected Respondents will include the highest ranking Respondents who performed adequately in the evaluation scoring and who offer the opportunity to provide a best value solution for the State. The Agency will post a notice on the Vendor Bid System stating the Agency's short-list.

Key Elements of an Evaluation



Conducting a successful response evaluation depends on these key elements:

1. Consistent use and application of evaluation criteria.
2. Consistent use and application of evaluation rating standards among all evaluators and responses being evaluated.
3. A careful review of the language in each response:
 - Verify how the respondent will meet ITN requirements
 - Identify assumptions (whether or not labeled as such)
 - Identify any statements that may indicate increased risk to the Agency
4. Fully documented evaluation findings.

Evaluation Committee Members & Advisors



Subject Area	Evaluators	Advisors
Claims	Audra Wiggins, Peggy Conklin Gail Griffin-Hall, Denise Haney	Aaron Dienger, Wayne Messina, Tammy Brennan, Doris Bruce
Appeals	Dorothy Johnson, Amanda Moore, Sondra Timpson	John Pelham
Benefit Payment Control	Dianne Parcell, Robin Nichols, Rick Ashton	Debbie Moore, Andy Loveland
Adjudication	Benny Collazo, Eddy Harden, Johnnie Patronis	Aaron Dienger, Sandy McPhaul, Daphne Lewis
Project Approach and Methodology	Tom McCullion, Ron McCranie, Donna Winsloe, Bahram Samani	Andy Loveland, Allen Northrup
Company Profile and Experience	Tom McCullion, Ron McCranie, John Herndon, Donna Winsloe	Wayne Messina Laura Jennings
System Development (Technical)	Tom McCullion, Denise Haney, Bahram Samani, Ernie Spangler	Andy Loveland, Allen Northrup



Evaluation Committee Roles & Responsibilities

- Maintain Confidentiality – do not discuss solicitation and responses with others; responses are **confidential** until final award; then responses are public records unless explicitly protected
- Represent the Agency and other stakeholders in the response evaluation – you are here on their behalf
- Read each response in its entirety
- Evaluate each response section, as assigned **using your best judgment based upon your experience**
- Record evaluation notes and score for each response using the provided [Evaluator Workbook](#). This workbook:
 - Includes text from applicable sections of the ITN for each section to be evaluated
 - Provides guidance to consider in your evaluation
 - Provides guidance on a point range to be assigned
 - Provides a place for your notes and comments in support of your rating
 - The original must be returned in order to finalize and summarize scores and support the selection of short-listed vendors
 - Is a public record



Evaluation Committee

Roles & Responsibilities (cont.)

- Adhere to the evaluation schedule
- Provide completed Evaluator Workbooks to Purchasing for score finalization and summarization
- Raise questions and issues as they occur with assigned Advisors for designated areas – do not cross advisors
- Raise clarification requests regarding the Response and schedule issues as they occur with Purchasing
- Participate in the Public Meeting discussion to determine the final shortlist of Respondents
- Identify the response's strengths and weaknesses to support the rating given
- Present specific comments to the response (with reference to the page and paragraph) and to the pertinent ITN requirement(s)
- Apply a rating on each evaluation factor in each response
- Evaluate only the factors that were listed in the ITN

Advisor Role & Responsibilities



- Review the ITN and Addendum 1
- Review all compliant responses
- Respond to questions and issues as they occur with assigned Evaluators
- Raise clarification requests and schedule issues as they occur with Purchasing

- Advisors will not be a conduit between evaluators
- Advisors will not make recommendations, direct scores or otherwise perform the role of an evaluator

Response Evaluation Tools Overview



- **Mandatory Response Requirements Checklist** (Purchasing only)
- **Evaluator Workbook** (Evaluation Team Members)
- **ITN Technical Points Calculation Worksheet** (Purchasing only)
- **ITN Cost Points Calculation Worksheet** (Purchasing only)
- **ITN Evaluation Summary Worksheet** (Purchasing only)

Do's



- Review the ITN prior to July 21, 2010
- Ask assigned Advisor(s) content specific questions
- Ask Purchasing response clarification, evaluation process and evaluation schedule related questions
- Consistently evaluate assigned areas – apply the same scoring methodology to each response
- The best job you can given what you know
- Keep the broader Unemployment Compensation view in mind – not only your area of expertise
- Evaluate each vendor's response against the ITN requirements
- Write notes and scores very clearly and legibly for future reference
- Evaluate responses against the ITN requirements
 - Example of what to write: Respondent #5's approach does not meet technical requirements as defined in Section C.4.2. because ...
- Look carefully at the text in the response that may include statements and/or assumptions that could indicate increased risk to the Agency

Do's (cont.)



- Provide detailed comments and accurate references. Comments should be complete, clear, legible and detailed enough that a later reader is able to determine the evaluator's intent without having to contact them.
 - Example of what NOT to write: Respondent #2, page 7, not where we are going. (The meaning of this comment would not be clear to a later reader.)
 - Example of what to write: Respondent #2, page 7, para 3. The Respondent does not appear to understand the direction of the program nor the intent of the ITN and has specified an approach that has been proven unsuccessful on this program in the past. (This description stands on its own.)
 - Example of what NOT to write: Respondent #3 offers great resumes. (Too vague – How are they great?)
 - Example of what to write: The Key Personnel resume presented by Respondent #3 offers the Agency a strong technical staff member with 13 years of UC experience and 25 years of management experience. (This describes how the experience directly relates.)
- Ensure that it is clear how your comment relates to the evaluation factor.
- Use section references, where possible, to limit amount of time and space that each comment requires. If additional space is needed for comments, use the back of the same page of the evaluator workbook.
 - Example of what NOT to write: Respondent #2's approach to training is overly burdensome for the Agency. Respondent #2 states, "XYZ Inc. proposes to examine the market to determine if the requirement for a training session is required. Once they have determined that there might be a need..."
 - Example of what to write: The training approach presented in section 4.3.5 of Respondent #2's response relies on the Agency participants rather than contractor responses as required by section 4.2.7 of the ITN.

Do's (cont.)



- Document your reasoning for any potential increased risk to the Agency on the evaluation form.
- Give each response the same consideration. The Respondent's name should not influence (positively or negatively) the evaluator's comments or ratings, except when evaluating past performance.
- Provide comments that are clear, legible and "plainly" written.
- Avoid using language that may be too "technical".
- Avoid using language that is jargon-laden and legalistic. This will not clearly convey important information but may cause confusion and misinterpretation.
- Avoid undefined or overused abbreviations and acronyms.
- Be fair and consistent in the response evaluation.
- If an item is a strength/weakness for one response it should also be noted as a strength/weakness when it appears in another response.
- Be critical, but fair in your evaluation.
- Do not "take it easy" or be overly harsh. Fairly evaluate all responses against the requirements of the ITN.

Don'ts



- Do not talk with other Evaluation Committee members until the Evaluation Committee is disbanded.
- Do not solicit scores from others.
- Do not compare notes with others.
- Do not discuss vendor's responses or the evaluation process with others.
- Do not take calls or inquiries from vendors – direct all vendors to Purchasing.
- Do not rate an idea as a positive in one response and the same idea as a negative in another, be consistent.
- Do not rate based on criteria outside the ITN.
- Do not violate the Sunshine Law (Chapter 119 F.S.)

Always Ask Yourself



- How is the contractor going to meet the requirements of the ITN?
 - Simply stating that, “I will comply” with the requirements does not explain how they intend to accomplish compliance with the requirements.
 - Do not make assumptions. Evaluate the text in the proposal.
- If the Agency decision is later protested, would I be able to defend this assessment?
 - Ensure that your comments are concise, clear and professionally stated.
 - Antagonistic or inflammatory comments can lead to a protest and must be avoided. This is important in all materials prepared as part of the evaluation because all notes, worksheets, and materials are “discoverable” in a protest. This means, that if a protest occurs, the Agency is legally obligated to provide these materials to the protesting contractor.

Next Steps



- Receipt of Vendor responses – July 16, 2010
- Completion of the Mandatory Response Requirements Checklist by Purchasing – July 20, 2010
- Distribution of responses to the Evaluation Committee Members & Advisors – July 21, 2010
- Checkpoint for evaluation and scoring of responses – July 28, 2010
- Evaluation and scoring of responses – complete by August 4, 2010
- Distribute Summary of Evaluation – August 9, 2010
- Public Meeting to Discuss and Confirm Short-list of Vendors – August 10, 2010, 10 a.m.
- Post Short-list to Vendor Bid System – August 10, 2010, 3 p.m.



Questions & Answers

Thank-you!