

System Requirements Evaluation Checklist

<p>BIDDER'S NAME:</p>			
EVALUATION CRITERIA	YES	NO	SCORE
<p>The evaluation will be performed using the detailed Solution Approach and Desirable Requirements evaluation worksheets:</p>			
<p>Volume 1: Response to Requirements Section 6 – System Requirements Response contains the completed Appendix A – System Requirements Workbook in its entirety with the Bidder indicating appropriate responses for all Mandatory and Mandatory Optional requirements (E, U, M, C, or R).</p>			
<p>Volume 1: Response to Requirements Section 6 – System Requirements Response contains the completed Appendix A – System Requirements Workbook in its entirety with the Bidder indicating appropriate responses for all Desirable requirements (E, U, M, C, R, or X). (bring forward score from Desirable Requirements Evaluation Worksheet)</p>			
<p>Volume 1: Response to Requirements Section 7 – Business Solution Approach contains a narrative description of the Bidder's approach for each requirement. (bring forward score from Business Solution Approach Evaluation Summary Worksheet)</p>			
<p>Volume 1: Response to Requirements Section 7 – Business Solution Approach, Project Management Approach. (bring forward score from Project Management Approach Evaluation Summary Worksheet)</p>			
<p>Volume 1: Response to Requirements Section 8 – Service Level Agreements contains a narrative description of the Bidder's approach to SLAs and a statement indicating agreement to the State's SLA requirements.</p>			
<p>COMMENTS:</p>			

* If the response to any item is "NO", please include explanatory comments.

Desirable Requirements Evaluation Worksheet

The following page provides the worksheet to score Bidders' response to the Desirable Requirements (Appendix A of the RFP). This is a scorable component of Bidders' proposals. The maximum score for the Desirable Requirements is 120 points.

Req #	Requirement	Level of Importance	Vendor Response	Score E,U,M,C,R=1 X=0
F.1.2.4	The system shall provide the ability to compare batch-loaded site-level data to existing CNIPS site-level data to support site change requests.	2		
F.1.7.1	System shall provide the ability to submit a Startup Grant or Expansion Grant Request online.	2		
F.1.7.2	The system shall automatically calculate minimum eligible grant amount and maximum eligible grant amount based on criteria entered by CDE and edit the request against these as part of the validation of the grant request submission.	2		
F.1.7.3	System shall provide the ability to input Startup Grant Request and Expansion Grant Request information as specified by CDE.	2		
F.1.7.4	System shall provide the ability to customize the list of labor categories, and income and expense line items for a Startup Grant Request, for a given program and program year.	2		
F.2.2.3	System shall provide the ability to capture a physical image of commodities at the time of receiving.	1		
F.2.2.6	System supports automatic data collection capabilities for inventory management and order selecting, e.g., wireless or radio-frequency bar code scanners	2		
F.4.1.11	System shall provide the ability for an organization to electronically acknowledge receipt of findings.	2		
F.5.4	System shall capture an aggregate evaluation score for each course, trainer and site.	2		
F.5.5	System shall provide the ability to capture information about available training facilities including driving directions, room numbers or names, fees or costs associated with use, features	2		

Business Solution Approach Evaluation Worksheets

These worksheets facilitate evaluation of the Bidder's Solution Approach, which is a mandatory scorable component of the proposal. The maximum score for the Business Solution Approach is 120 points.

Each section will be rated as either "met" State requirements or "non-compliant". If the Bidder's response meets the State's requirements, as identified in the RFP, the State will assign the full score of 120 points. Failure to meet the requirements as dictated by the RFP will result in rejection of the proposal.

RATING	DESCRIPTION
0 - Non-Compliant	Fails to address the component or the Bidder does not describe their approach related to the component.
1- Met the State's Requirement	The response addresses the State's requirement.

The Solution Approach must address the following components:

- 1 Business Function Approach
 - 1.2 Program Agreements and Ongoing Changes
 - 1.3 Food Distribution
 - 1.4 Claims for Reimbursement
 - 1.5 Monitoring and Compliance
 - 1.6 Training
 - 1.7 Reports
- 2 Technical Approach
 - 2.2 Proposed Architectural Solution
 - 2.3 Workflow Functionality
 - 2.4 Usability, Features and Benefits
 - 2.5 Interface Strategy
 - 2.6 Data Conversion Strategy
- 3 Implementation Approach
 - 3.2 Project Management Approach
 - ~~3.3 System Design and Development Methodology~~
 - 3.4 Training Approach
 - 3.5 Knowledge Transfer Approach
 - 3.6 Project Deliverables
 - 3.7 Change Management Approach
 - 3.8 Transition Plan
 - 3.9 Testing Approach
- 4 Service Support Approach
 - 4.2 Maintenance Plan
 - 4.3 Warranty
 - 4.4 Application Support Plan

The table below provides a summary form to capture the evaluation of each component. Evaluation factors for each of these components are provided on the following pages.

Business Solution Approach Evaluation Summary Worksheet

Bidder:	
Solution Approach Component	Score (0 or 1)
1 Business Function Approach – Section VI.3.1	
1.2 Program Agreements and Ongoing Changes	
1.3 Food Distribution	
1.4 Claims for Reimbursement	
1.5 Monitoring and Compliance	
1.6 Training	
1.7 Reports	
2 Technical Approach – Section VI.3.2	
2.2 Proposed Architectural Solution	
2.3 Workflow Functionality	
2.4 Usability, Features and Benefits	
2.5 Interface Strategy	
2.6 Data Conversion Strategy	
3 Implementation Approach – Section VI.3.3	
3.2 Project Management Approach	
3.3 System Design and Development Methodology	
3.4 Training Approach	
3.5 Knowledge Transfer Approach	
3.6 Project Deliverables	
3.7 Change Management Approach	
3.8 Transition Plan	
3.9 Testing Approach	
4 Service Support Approach – Section VI.3.4	
4.2 Maintenance Plan	
4.3 Warranty	
4.4 Application Support Plan	

Business Functional Approach – Claims for Reimbursement

The Bidder must describe its product capabilities and proposed approach to supporting CDE's claim processes in the CNIPS solution.

CDE is interested in Bidders providing information about how their specific software components will be used to meet CDE's needs as expressed in Appendix A – System Requirements Workbook.

Considerations:

1. *Is this section comprehensive and clearly written?*
2. *Does the proposed approach meet RFP requirements regarding claims for reimbursement?*

Notes and Comments:

BIDDER:

EVALUATOR SIGNATURE:

SCORE:

Business Functional Approach – Monitoring and Compliance

The Bidder must describe its product capabilities and proposed approach to supporting CDE's monitoring processes in the CNIPS solution.

CDE is interested in Bidders providing information about how their specific software components will be used to meet CDE's needs as expressed in Appendix A – System Requirements Workbook.

Considerations:

1. *Is this section comprehensive and clearly written?*
2. *Does the proposed approach meet RFP requirements regarding monitoring and compliance?*

Notes and Comments:

BIDDER:

EVALUATOR SIGNATURE:

SCORE:

Bidder:				
Data Conversion Strategy Approach	Does Not Meet	Partially Meets	Meets	Score
Proposed approach demonstrates an understanding of CDE's requirements. Does not meet = 0 Partially meets = 3 Meets = 7				
Proposed approach identifies data conversion tasks and dependencies. Does not meet = 0 Partially meets = 3 Meets = 6				
Proposed approach identifies data conversion risks and issues. Does not meet = 0 Partially meets = 2 Meets = 5				
Proposed approach represents a complete and thorough data conversion strategy. Does not meet = 0 Partially meets = 3 Meets = 7				
Total Data Conversion Strategy Score (Maximum score = 25)				

Evaluator _____ **Date:** _____

Bidder Qualifications and References

Bidder Corporate Reference Check Questionnaire

Sample Evaluator Introduction:

Good morning (afternoon). My name is [Evaluator name] and I am with the State of California, Department of Education. We are doing a competitive procurement for services and one of the Bidders, [Contractor's name], provided you as a reference. Is this a convenient time for you to answer a few questions regarding the Contractor's performance on the [project name from Client Reference Form], or would another time be more convenient? This should take no more than 15 minutes. [If another time is more convenient, establish when the call back will occur].

Reference Check Date/Time:

Evaluator Name:

Bidder Name:

Client Name:

Contact Name/ Phone #:

Project Name:

1. Describe the services or products (functionality) that you contracted with Vendor.

2. What were the dates of the project/services?

3. What components of the product were implemented, or, what services were provided?

3. Vendor/Project performance:	Did not meet expectations	Met Expectations	Exceeded Expectations
3a. Quality of work products			
3b. Timeliness of deliverables and other work products			
3c. Effectiveness of bidder's personnel			
3d. Success of the work product (i.e., was the project successfully implemented)			
3e. Overall satisfaction with the vendor/product			

4. Any other comments or thoughts?

Bidder Corporate Reference Summary Score Worksheet

Bidder:				
	Did Not Meet Expectations (0 points)	Met Expectations (1 point)	Exceeded Expectations (3 points)	Score
Client Name:				
Quality of work products				
Timeliness of deliverables and other work products				
Effectiveness of bidder's personnel				
Success of the work product				
	Did Not Meet Expectations (0 points)	Met Expectations (2 point)	Exceeded Expectations (5 points)	
Overall satisfaction with the vendor/product				
	No (0 points)	Yes (2 points)		
Similar functionality and/or services as requested by CDE				
Subtotal				
Client Name:				
Quality of work products				
Timeliness of deliverables and other work products				
Effectiveness of bidder's personnel				
Success of the work product				
	Did Not Meet Expectations (0 points)	Met Expectations (2 point)	Exceeded Expectations (5 points)	
Overall satisfaction with the vendor/product				
	No (0 points)	Yes (2 points)		
Similar functionality and/or services as requested by CDE				
Subtotal				

Bidder:	Did Not Meet Expectations (0 points)	Met Expectations (1 point)	Exceeded Expectations (3 points)	Score
	Client Name:			
Quality of work products				
Timeliness of deliverables and other work products				
Effectiveness of bidder's personnel				
Success of the work product				
	Did Not Meet Expectations (0 points)	Met Expectations (2 point)	Exceeded Expectations (5 points)	
Overall satisfaction with the vendor/product				
	No (0 points)	Yes (2 points)		
Similar functionality and/or services as requested by CDE				
Subtotal				
Client Name:				
Quality of work products				
Timeliness of deliverables and other work products				
Effectiveness of bidder's personnel				
Success of the work product				
	Did Not Meet Expectations (0 points)	Met Expectations (2 point)	Exceeded Expectations (5 points)	
Overall satisfaction with the vendor/product				
	No (0 points)	Yes (2 points)		
Similar functionality and/or services as requested by CDE				
Subtotal				